



**Board of Commissioners Meeting
March 24, 2015
PD Community Room
6:30 PM**

- I. **COMMENCEMENT**
 - A. Call to Order
 - B. Ceremonial Opening
 - C. Adoption of Agenda
- II. **PUBLIC COMMENTS**
- III. **CONSENT AGENDA**
 - A. Approval of Minutes and Seal Closed Session
 - 1) January 28, 2015 Special Session
 - 2) January 29, 2015 Special Session
 - B. Approval of Resolution Creating Parks & Recreation Department
- IV. **RECOGNITIONS & REPORTS**
 - A. 2015 Tree City USA Award
[Presenter: Andy Cranfield](#)
 - B. Mayor's Report
 - C. Commissioner's Report
 - D. Manager's Report
- V. **OLD BUSINESS**
 - A. Petition RZ-003080-2015
Request by McCray Smith, on behalf of Cray, Inc, for a rezoning/map amendment on parcel 06-138-001 from R4 (Single-family Residential) to C1 (Neighborhood Commercial) located at 3808 South Providence Road.
[Presenter: Lisa McCarter](#)
 - B. Petition TA-003098-2015
Request by Staff, on behalf of the Board of Commissioners, to amend Section 16.1.9 (Effect of Denial on Subsequent Petitions) and Section 16.2.11 (Twelve-Month Limitation on Re-Application) of the Waxhaw Unified Development Ordinance to revise the requirements with regard to the twelve-month resubmission period on re-application after a denial of a rezoning or conditional rezoning application by the Board of Commissioners.
[Presenter: Chris Rice](#)
 - C. Discussion and Possible Action on Key Financial Strategies
[Presenter: Jim Prosser](#)
 - D. Discussion and Possible Action on Letter of Intent with YMCA for use of Adjacent Town Property and Collaborative Programming
[Presenter: Steve Maher](#)

- E. Discussion and Possible Action of Agreement for the Acquisition of Approximately 13 Acres from Wells Fargo in Conjunction with the Waxhaw YMCA
Presenter: Chaplin Spencer

VI. **NEW BUSINESS**

- A. Update and Discussion on the Comprehensive Plan
Presenter: Benchmark
- B. Presentation of Salary Study by CCOG
Presenter: Bob Henderson
- C. Discussion and Possible Approval of Furniture Quote for Town Board Chambers
Presenter: Greg Mahar

VII. **CLOSED SESSION**

- A. Personnel, contractual matters and to seek legal counsel per G. S. 143.318.11: Personnel, Contractual Matters and Real Estate

VIII. **ADJOURNMENT**

To speak concerning an item on the Agenda, please print your name and address on the signup sheet on the counter prior to the meeting. Each speaker will be limited to 3 minutes.

PLEASE SILENCE YOUR CELL PHONES WHILE MEETING IS IN PROGRESS



**TOWN OF WAXHAW, NORTH CAROLINA
RESOLUTION CREATING PARKS AND RECREATION DEPARTMENT**

WHEREAS, with the Waxhaw Board of Commissioners believes that the residents of the Town of Waxhaw benefit from recreational activities;

WHEREAS, the Board of Commissioners believes that parks and recreation opportunities create a vibrant community;

WHEREAS, Town of Waxhaw's recent growth provides the opportunity and need to establish a separate line department to organize and develop the Town's parks and recreation system; and

WHEREAS, the Town wishes to formalize its commitment to parks and recreation by creating a parks and recreation department in accordance with the Recreation Enabling law codified at N.C.G.S. 160A-350, *et seq.*

NOW, THEREFORE, BE IT RESOLVED that the Town of Waxhaw Board of Commissioners hereby establishes a Parks and Recreation Department vested with the authority to operate the Town's parks and recreation system.

Adopted and effective this 24th day of March 2015.

Daune Gardner, Mayor

ATTEST:

Melody Shuler, Town Clerk



V. Old Business

A. Petition RZ-003080-2015

Request by McCray Smith, on behalf of Cray, Inc, for a rezoning/map amendment on parcel 06-138-001 from R4 (Single-family Residential) to C1 (Neighborhood Commercial) located at 3808 South Providence Road.

Presenter: [Lisa McCarter](#)

Information

A public hearing was held at the March 10, 2015 meeting for Petition RZ-003080-2015 to amend the zoning of the property from R4 to C1.

On February 16, 2015, the Planning Board voted unanimously (7-0) to send an unfavorable recommendation on RZ-003080-2015 to the Board of Commissioners. Staff does not recommend approval of the proposed rezoning RZ-003080-2015, but believes that a Conditional District Rezoning with limited uses and conditions that are sensitive to the surrounding single-family residential properties might be appropriate. A protest petition signed by numerous residents from The Oaks subdivision was submitted but deemed invalid.

Board Action

- Possible action on Petition RZ-003080-2015 to rezone parcel 06-138-001 from R4 to C1. The Board should move forward with approval or denial of the Petition.



STAFF REQUEST TO PLACE ITEM ON BOARD AGENDA

Date of Meeting: March 10, 2015

Department Requesting: Planning and Community Development

Staff Member Requesting: Lisa McCarter

Case #: RZ-003080-2015

Brief Summary of the item:

Petition RZ-003035-2014 is a request by McCray Smith, on behalf of Cray, Inc., for a rezoning/map amendment on parcel 06-138-001 from R4 (Single-family Residential) to C1 (Neighborhood Commercial) located at 3808 S. Providence Road.

Attachments Included:

- Application Packet
- Aerial Map
- Current Zoning Map
- Future Land Use Map
- Proposed Zoning Map
- Staff Report
- Zoning Use Table from the Unified Development Ordinance
- _____
- _____
- _____

Date submitted to Town Clerk: 2/27/2015



Town of Waxhaw
 Planning & Community Development
 PO Box 617
 Waxhaw, NC 28173
 704-843-2195 (Phone)
 704-243-3276 (Fax)
 www.waxhaw.com

Date Received	1-21-2015
Received By	DL
Fee	330.00

ZONING CHANGE APPLICATION

Application Number: RZ-003080-2015 Date of Application: 21 JAN 15

Applicant Information

Applicant Name: CRAY, INC. / MCCRAY SMITH

Applicant Mailing Address: 120 GOUTHCLIFF DRIVE

Applicant Telephone: 704-219-2230

Property Owner Name: CRAY, INC.

Property Owner Mailing Address: P.O. BOX 1315
WAXHAW NC 28173

Property Owner Telephone: 704-219-2230

Relationship of Applicant to Property Owner: SAME

Subject Property Information

Property Location: 3808 S. PROVIDENCE RD.

Tax Map and Parcel Number(s): 06279001

Existing Zoning: # R-4 In Flood Area? NO

Requested Zoning District: # C1 Acreage 0.91 AC.

Current Use of Land: RESIDENTIAL

Surrounding Land Uses: MIXED: C1, R-4, R-3

Comments: BUSY PROVIDENCE RD. IS MAIN
THROUGHFARE IN & OUT OF
WAXHAW, PERFECT FOR COMM.
USES.

No application will be considered complete unless it has been properly completed and submitted to the Zoning Administrator by the deadline for the Planning Board Meeting.

To the best of my knowledge, all of the information herein submitted is accurate and complete.


(Signature of Property Owner)

21 JAN 15
(Date)


(Signature of Applicant)

21 JAN 15
(Date)

All of the information herein required has been submitted by the applicant and is included or attached with this application.


(Signature of Zoning Administrator)

1-21-15
(Date)

TO BE FILLED OUT BY ZONING ADMINISTRATOR

Completed application submitted on: 1-21-2015

Reviewed by Planning Board on: 2-16-2015

Action of Planning Board: unanimous unfavorable recommendation

(7-0). Reasons: traffic concerns for the intersection; not in keeping with the Highway 16 Plan; driveway access on Hwy 16; can be any use allowed in C1 and, therefore, would not protect the neighborhood.

Town Board Public Hearing Held On: _____

Date of Town Board Decision: _____

Action Taken by Town Board: _____

***Newspaper Affidavit should be attached**

Public Hearing Notice Filed in (Newspaper): _____

Date(s) Notices Published: _____

Notification to adjacent property owners mailed on: _____

Property Posting Date: _____

SUBJECT PROPERTY:

06138001 Cray Inc., P.O. Box 1315, Waxhaw, NC 28173

ADJACENT PROPERTIES:

06141001 Providence at 16, LLC, 2800 Sturgis Rd., Oxnard CA 93030

06138018 Castora Real Estate Group, Inc., 601 Birchwood Drive, Waxhaw NC 28173

06168001K The North Carolina LLP, Invitation Homes, 901 Main St., Suite 4700, Dallas Tx 75202

06138002 Belynda Gordon Greene, James Donald Gordon, 246 Alexandria Rd., Sedona AZ 86336

06138003 Robert Neil Gordon, 3750 S Providence Rd., Waxhaw NC 28173

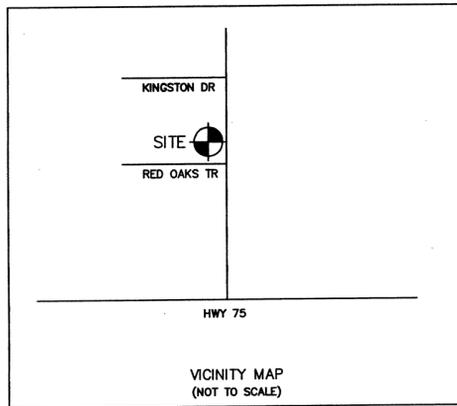
EXHIBIT "A"

LEGAL DESCRIPTION
~ 3808 S. PROVIDENCE RD.

BEGINNING at a point on the western right of way line of N.C. Highway 16, said point being a southeastern corner of Hallis Gordon property (Deed Book 138 page 297), now or formerly, and runs thence with the right of way line of said highway, South 16-15-08 East 138.62 feet to an iron; thence South 74-55-00 West 256.64 feet to an iron; thence North 14-59-45 West 138.98 feet to an iron in the old line; thence North 75-00-15 East 253.60 feet to the point of Beginning and containing .81 of an acre as surveyed by J.B. Fisher Surveyors on October 28, 1993.

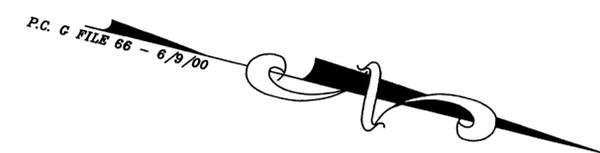
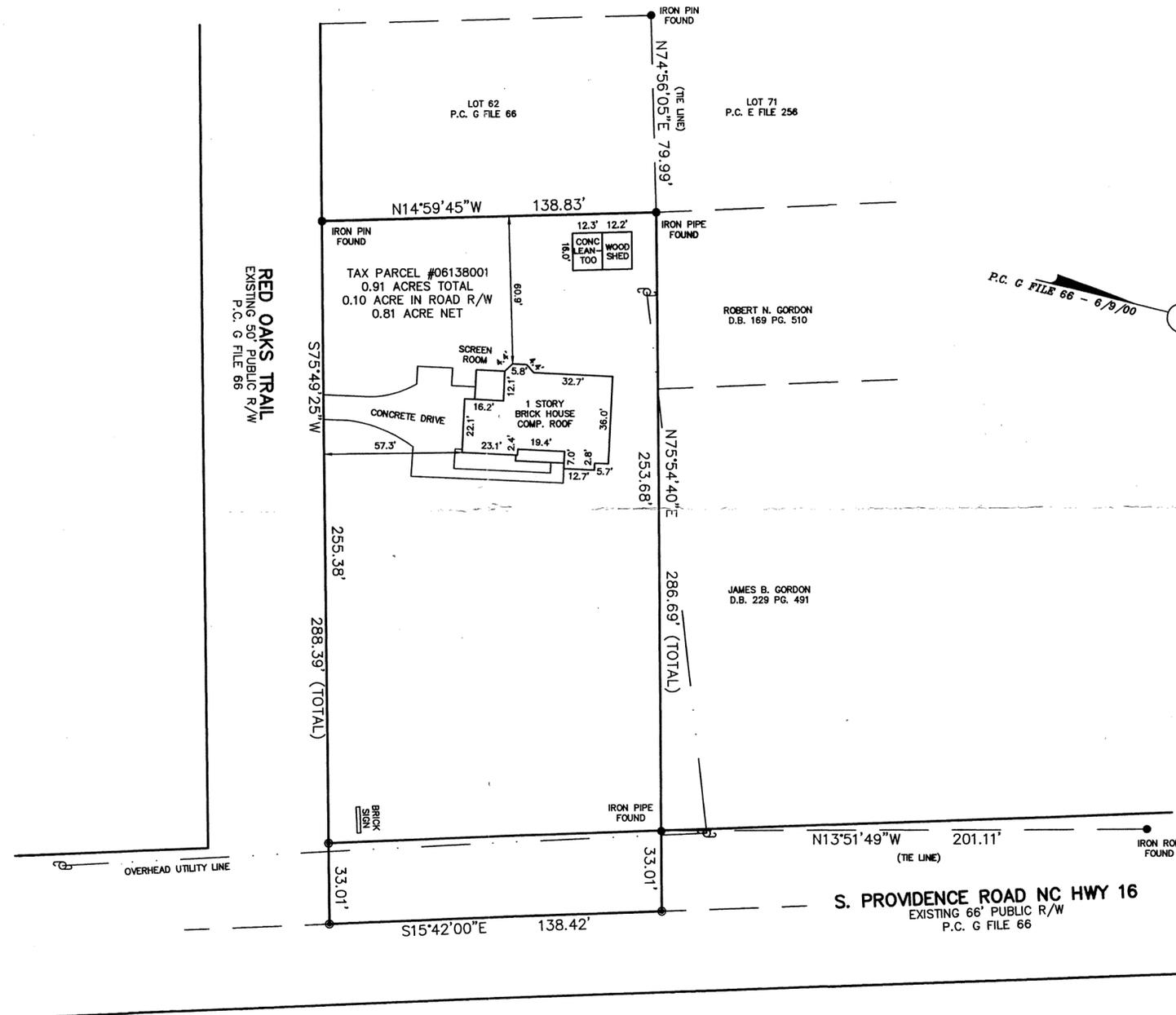
I CERTIFY THAT THIS MAP WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION (DEED RECORDED IN BOOK 166, PAGE 276; THAT THE BOUNDARIES NOT SURVEYED ARE INDICATED AS DRAWN FROM INFORMATION AS SHOWN ON PLAT; THAT THE RATIO OF PRECISION OR POSITIONAL ACCURACY IS 1:10,000+; AND THAT THIS MAP MEETS THE REQUIREMENTS OF THE STANDARDS OF PRACTICE FOR LAND SURVEYING IN NORTH CAROLINA (21 NCAC 56. 1600). THIS 13th DAY OF MAY, 2013.

SIGNED 
 JOHN D. SKIDMORE III, NCPLS L-3837



LEGEND

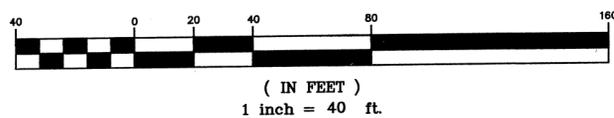
- R/W = RIGHT OF WAY
 ● = CORNER AS DESCRIBED
 ☆ = LIGHT POLE
 ⊙ = COMPUTED POINT
 ⊕ = UTILITY POLE
 □ = CONCRETE MONUMENT
 ⊗ = SANITARY SEWER MANHOLE
 ⊕ = STORM DRAIN MANHOLE
- — — — — PROPERTY LINE
 — — — — — ADJOINER LINE
 — — — — — RIGHT OF WAY
 — — — — — TIE LINE
 - - - - - STORM DRAIN EASEMENT
 - - - - - SETBACK LINE



NOTES:

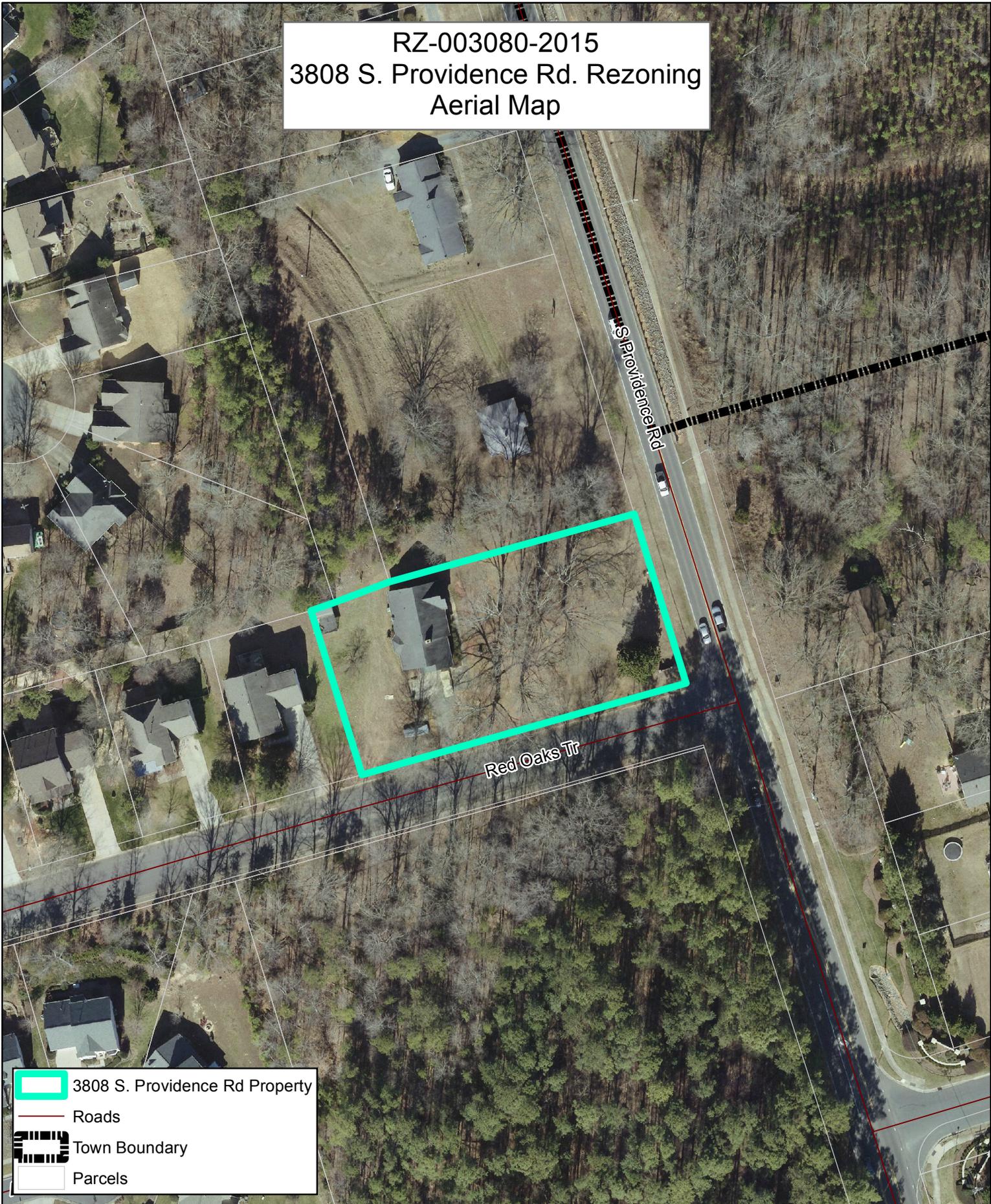
- AREA BY COORDINATE METHOD
- THIS IS A SURVEY OF AN EXISTING PARCEL OR PARCELS OF LAND AND DOES NOT CREATE A NEW STREET OR CHANGE AN EXISTING STREET
- THIS MAP IS NOT INTENDED TO MEET G.S. 47-30 AND IS NOT TO BE RECORDED AS A PLAT
- SUBJECT PROPERTY MAY BE SUBJECT TO RECORDED OR UNRECORDED EASEMENTS, RIGHT OF WAYS, SETBACKS AND/OR RESTRICTIVE COVENANTS NOT SHOWN HEREON

GRAPHIC SCALE

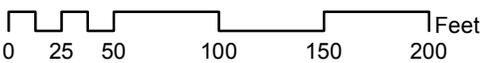


PHYSICAL SURVEY		SURVEY DATE 5/09/2013	SURVEY DATE 5/6/13
3808 S. PROVIDENCE ROAD 0.91 ACRE TAX PARCEL 06138001 WAXHAW, UNION COUNTY, NORTH CAROLINA		TAX No. 06138001	DRAWN BY: CGS
TO BE DEEDED TO: McCRAY SMITH		D.B. 166 PAGE 276	DRAWING 13-078.DWG
		SKIDMORE SURVEYING, INC. 5343 HIGHWAY 74 WEST MONROE, N.C. 704-289-4855	

RZ-003080-2015
3808 S. Providence Rd. Rezoning
Aerial Map



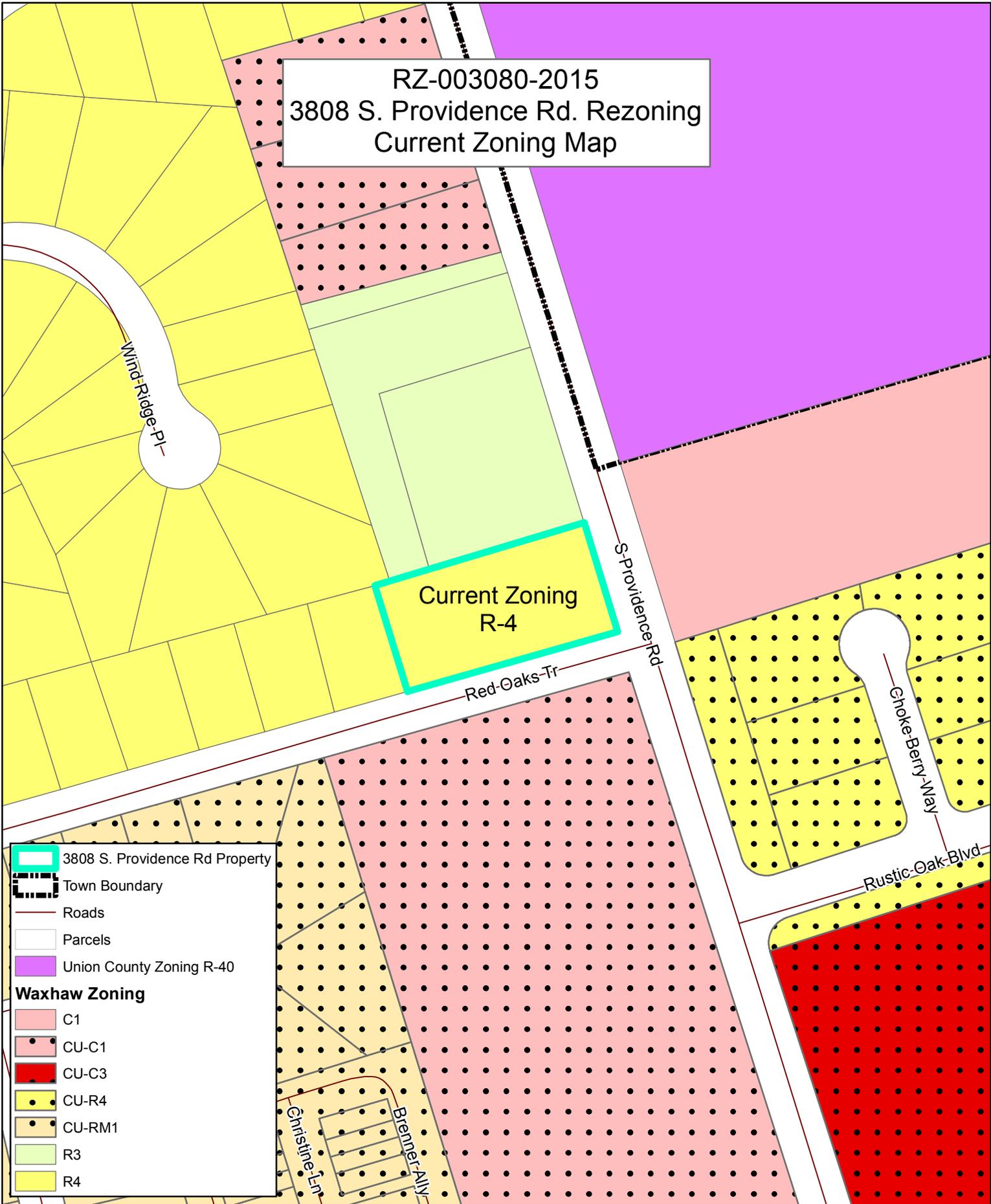
-  3808 S. Providence Rd Property
-  Roads
-  Town Boundary
-  Parcels



Data Source & Disclaimer
Data provided by Union County GIS and Town of Waxhaw GIS. The Town of Waxhaw does not guarantee the accuracy of the information displayed. Map created February 2015.



RZ-003080-2015
 3808 S. Providence Rd. Rezoning
 Current Zoning Map



3808 S. Providence Rd Property

Town Boundary

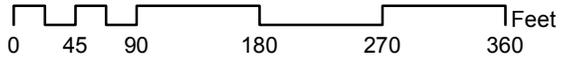
Roads

Parcels

Union County Zoning R-40

Waxhaw Zoning

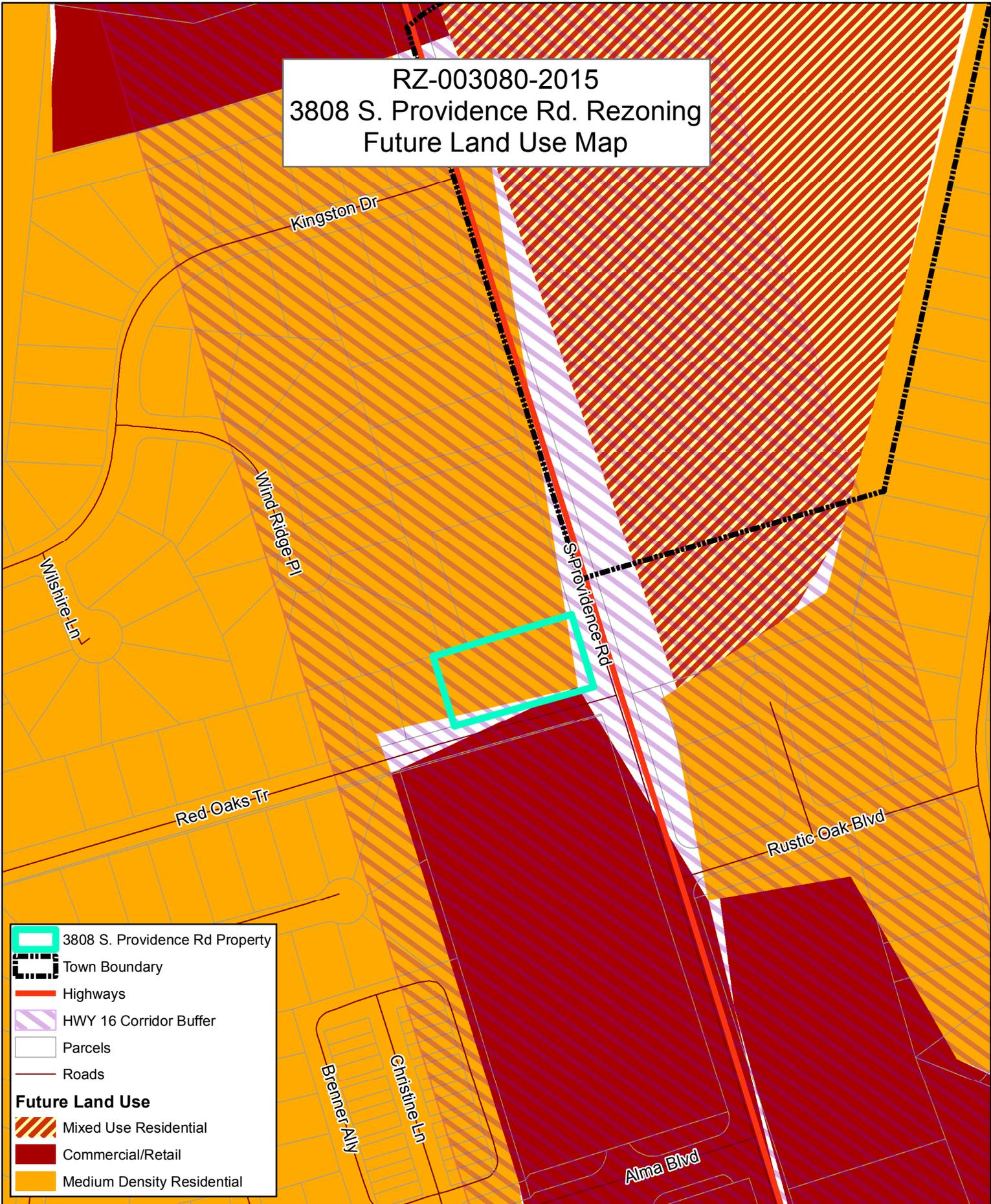
- C1
- CU-C1
- CU-C3
- CU-R4
- CU-RM1
- R3
- R4



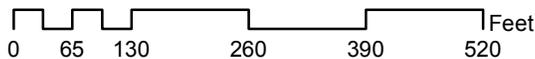
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RZ-003080-2015
 3808 S. Providence Rd. Rezoning
 Future Land Use Map



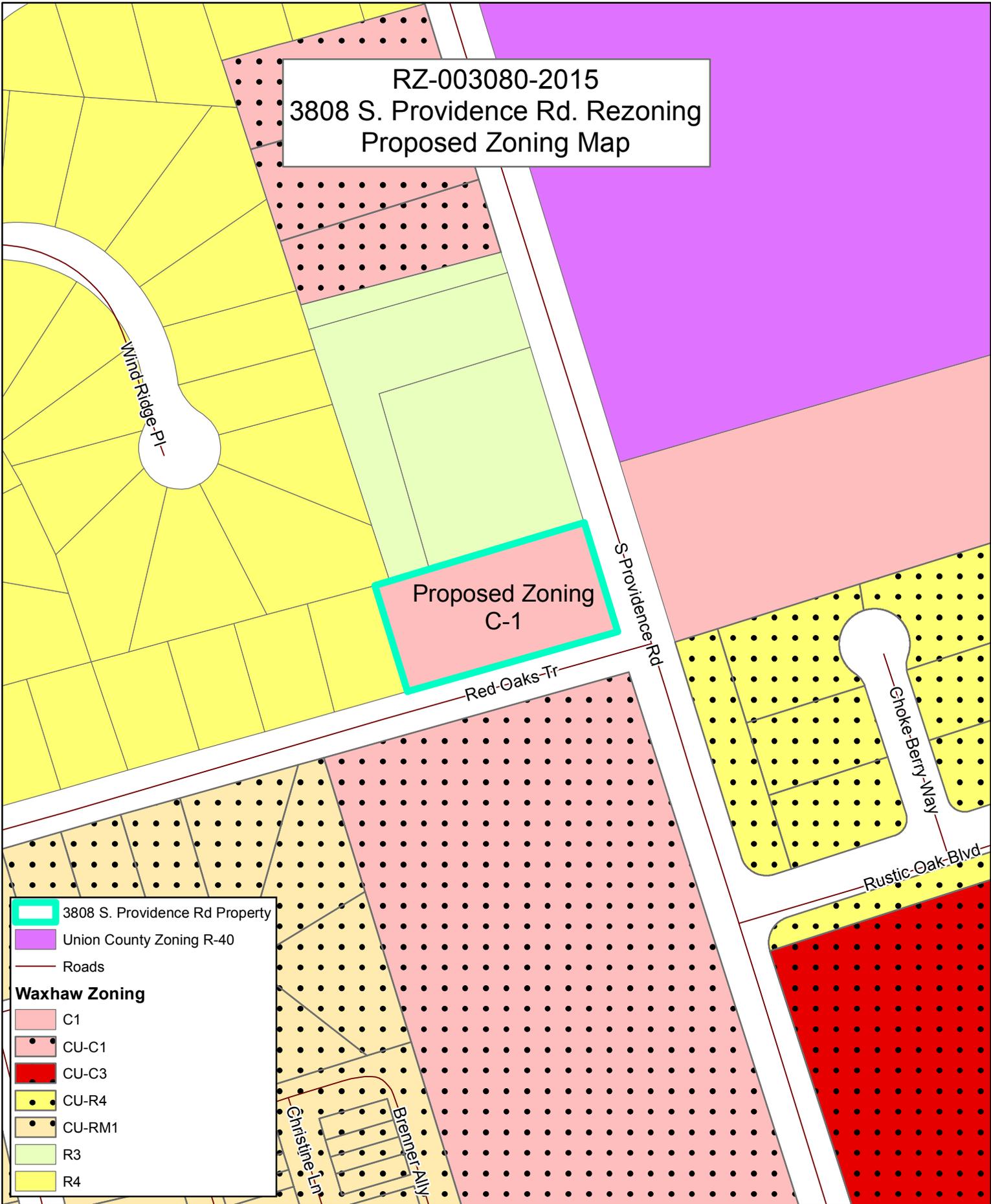
	3808 S. Providence Rd Property
	Town Boundary
	Highways
	HWY 16 Corridor Buffer
	Parcels
	Roads
Future Land Use	
	Mixed Use Residential
	Commercial/Retail
	Medium Density Residential



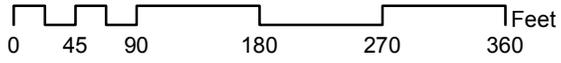
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RZ-003080-2015
 3808 S. Providence Rd. Rezoning
 Proposed Zoning Map



- 3808 S. Providence Rd Property
- Union County Zoning R-40
- Roads
- Waxhaw Zoning**
- C1
- CU-C1
- CU-C3
- CU-R4
- CU-RM1
- R3
- R4



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**Rezoning Petition RZ-003080-2015
3808 Providence Road South**

EXPLANATION OF THE REQUEST

Petition RZ-003080-2015 is a request by McCray Smith, on behalf of Cray, Inc., for a rezoning/map amendment on parcel 06-138-001 from R4 (Single-family Residential) to C1 (Neighborhood Commercial) located at 3808 S. Providence Road.

LOCATION AND CURRENT LAND USE

The property is located at 3808 S. Providence Road and has frontage on S. Providence Road and Red Oaks Trail. The property currently has a single-family residence located on it. The property is 0.91 acres in size.

- Condition and land use of the surrounding properties. The adjoining properties are:
 - To the north – Two single-family residences along S. Providence Road zoned R3 (Single-family Residential) and one single-family residence located in the Kingston on Providence subdivision zoned R4 (Single-family Residential).
 - To the east – Across S. Providence Road is a vacant wooded parcel zoned C1 (Neighborhood Commercial).
 - To the south – Across Red Oaks Trail is a vacant wooded parcel zoned CU-C1 (Conditional Use Neighborhood Commercial).
 - To the west – A single-family residence that is part of The Oaks on Providence subdivision zoned R4 (Single-family Residential).

EXISTING ZONING & LAND USE

The subject property is zoned R4 (Single-family Residential). According to Section 4.1.4 of the UDO (Unified Development Ordinance):

“The purpose of the R-4, Single Family Residential District is to provide for the residential use of land developed in a high density pattern. The principal structure of the R-4 zoning district is the single-family detached dwelling.”

According to Section 11 of the UDO the minimum lot size in the R4 zoning district is 12,000 sq. ft.

**2030 COMPREHENSIVE PLAN / FUTURE LAND USE MAP / HIGHWAY 16
CORRIDOR PLAN**

The Future Land Use Map from the 2030 Comprehensive Plan shows the property as Medium Density Residential and within the Providence Road Corridor Buffer which are described in the plan as follows:

“Medium Density Residential. These areas include existing and future areas for development of more dense residential neighborhoods that provide a diversity of housing types and housing options. Areas include single-family detached units, mobile homes, townhouses, duplexes, condominiums, apartments, senior housing, and other multi-family dwelling units, depending upon the character of existing neighborhoods. Housing densities should range from 3-8 dwelling units per acre. Other types of uses that may

occur are schools, parks, and some neighborhood commercial uses, such as coffee shops and small corner grocery stores.”

“Providence Road Corridor. This classification designates a corridor along Providence Road (NC-16) - the primary road corridor through Waxhaw - that has been identified for additional planning. A plan for this corridor should include recommendations for specific design standards, such as building orientation, location and amount of parking, pedestrian and bicycle facilities, signage, and architectural requirements. Standards should also address transportation design, such as access management.”

The Providence Road Corridor calls for further planning as was recently completed in the adoption of the Highway 16 Corridor Plan. The regulating plan from the Highway 16 Corridor Plan for this property calls for NMX (Neighborhood Mixed Use) which is described in in Section 4.1.17.B as:

“Neighborhood Mixed Use (NMX): The Neighborhood Mixed Use District consists of higher density, mixed use buildings that accommodate retail, offices, townhouses and apartments. It has a tight network of streets, with wide sidewalks, steady street tree planting and buildings set close to the sidewalks.”

PLANNING STAFF ANALYSIS

The property is currently single-family residential and adjacent to single-family residential properties. There is C1 and CU-C1 zoning across S. Providence Road and Red Oaks Trail respectively, however they are not immediately adjacent to the property and they remain vacant and undeveloped.

The Future Land Use Map in the 2030 Comprehensive Plan calls for Medium Density Residential and the property is located within the Providence Road Corridor. Medium Density Residential allows some neighborhood commercial uses, including coffee shops and small corner grocery stores which is in keeping with the requested C1 (Neighborhood Commercial) zoning district. The Providence Road Corridor states that further study is needed and this was achieved with the adoption of the Highway 16 Corridor Plan. The regulating plan contained in the Highway 16 Corridor Plan depicts the property as NMX zoning, which is in keeping with the C1 zoning district.

PLANNING STAFF RECOMMENDATION

The requested rezoning is in keeping with the 2030 Comprehensive Plan and Future Land Use Map and the Highway 16 Corridor Plan. This rezoning is a general rezoning request to C1 (Neighborhood Commercial), and therefore, no conditions can be placed on the approval and any use allowed in C1 could be placed on this parcel. A Zoning Table of Uses from the UDO is attached for your reference to see the uses that are allowed in the C1 zoning district.

The applicant has indicated to staff that the property would be used for an office if the general rezoning is approved, however, since this is a general rezoning request, the applicant could use the site for any use allowed in C1. Staff feels that some uses in the C1 zoning district may not be suitable for this property. Since this property is immediately adjacent to single-family residential properties and is under an acre, staff recommends that a Conditional District Rezoning would be more appropriate for the property. With a Conditional District Rezoning, conditions could be imposed by the Board of Commissioners and uses could be limited to those sensitive to the neighboring residential properties.

Staff does not recommend approval of the proposed rezoning RZ-003080-2015. However, given the recommendations of the 2030 Comprehensive Plan and associated Future Land Use Plan as well as the Highway 16 Corridor Plan, staff feels that a Conditional District Rezoning with limited uses and conditions that are sensitive to the surrounding single-family residential properties might be appropriate.

PLANNING BOARD RECOMMENDATION

The Planning Board, at their special February, 23, 2015 meeting, voted unanimously (7-0) to send an unfavorable recommendation on RZ-003080-2015 to the Board of Commissioners. The Planning Board stated the following reasons for the unfavorable recommendation: traffic concerns for the intersection; not in keeping with the Highway 16 Corridor Plan; driveway access on Providence Road; and that it could be any use allowed in C1 and, therefore, would not protect the neighborhood.

STATEMENT OF REASONABLENESS AND CONSISTENCY

The proposed zoning of this parcel appears to (not) be reasonable at this time. It also is (in)consistent with the future planning goals of the Town of Waxhaw.

Submitted By: Lisa McCarter

Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
ABC Store											X			
Accessory Structure (accessory to principal use)	9.20, 11.3.80	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS
Adult Care Center (See Day Care Center)														
Adult Establishment	11.3.1													CS
Air Conditioning Supply and Service (See Electric, Heating,...Supplies and Sales)														
Amusement Park (Outdoors)	11.3.2										CS		CS	CS
Animal Grooming Establishment	11.3.3									CS	CS	CS	CS	XS
Animal Hospital (no outdoor runs)	11.3.4								XS	XS	XS		XS	XS
Animal Hospital (with outdoor runs)	11.3.4									CS	CS		CS	XS
Animal Kennel	11.3.4									CS			CS	CS
Animal Shelter	11.3.4													CS
Animal Supply Store									X	X	X	X	X	X
Antique Store								X	X	X	X	X		
Apparel Store (See Clothing, Footwear, and Apparel Store)														
Appliance Sales and Repair (Indoor Storage)									X	X	X	C		
Appliance Sales and Repair (Outdoor Storage)	11.3.5													CS
Art Gallery								X	X	X	X	X		
Art Supply Store								X	X	X	X	X		
Auditorium, Assembly Hall as the principal use											C	C	C	C
Auto, Truck, Boat, Motorcycle Sales	11.3.22, 11.3.44										CS		CS	XS
Automobile Body Shop	11.3.6, 11.3.22												CS	XS
Automobile Broker										C			X	X
Automobile Club								X	X	X	X	X		
Automobile Detailing Shops	11.3.7, 11.3.22										CS	C	XS	XS
Automobile Parking Lot and Structures (Principal Use)									X	X	X	C	X	
Automobile Parts and Repair Store	11.3.6												XS	X
Automobile Parts and Supply Store	11.3.8									XS	XS	XS	XS	XS
Automobile Repair Shop	11.3.6, 11.3.22										CS	C	CS	CS
Automobile Salvage Yards (See Junkyard and Automobile Salvage)														
Automobile Service Station	11.3.9, 11.3.22									CS	CS	C		
Automobile Towing and Wrecker Service	11.3.22												CS	XS
Automobile Wash (Self-Serve)	11.3.10									CS	CS		CS	XS
Automobile Wash (Automatic)	11.3.11, 11.3.22									CS	CS		CS	XS
Bait & Tackle Shop										X	X			

NOTES

X - Permitted Use

XS - Permitted Use With Supp. Regs.

C - Conditional Use

CS - Conditional Use With Supp. Regs.

* Reference Sect. 21 Downtown

** No designation indicates use is not permitted **

Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Bakery (Retail)	11.3.67								XS	XS	XS	XS	XS	XS
Banks, Savings and Loan, Credit Union (See Financial Institution)														
Bank Teller Machines, Outdoor (Principal or Accessory Use)	11.3.22, 11.3.78								XS	XS	XS	XS		
Barn, Horse	11.3.14	CS	CS	CS	CS									
Barber/Beauty Shop	11.3.13							XS	X	X	X	X		
Beauty Supply and Cosmetics Store									X	X	X	X		
Bed and Breakfast Inn	11.3.15	CS	CS	CS	CS	CS	CS	XS	XS	XS	XS	CS		
Bicycle Sales/Service	11.3.22								CS	XS	XS	XS		
Billiard Parlor (See Pool Hall)														
Blueprint and Drafting Service									X	X	X	X		
Boat Sales (See Auto, Truck, Boat...Sales)														
Book Store									X	X	X	X		
Bowling Lanes											C		X	X
Building and Home Materials Center	11.3.16, 11.3.22										CS		XS	
Bus Passenger Station	11.3.22									XS	XS			
Cabinet and Woodwork Shops	11.3.67											XS	XS	XS
Camera and Photography Supply Store									X	X	X	X		
Camping and Recreational Vehicle Park	11.3.17, 11.3.22												CS	CS
Candy and Nut Store								C	X	X	X	X		
Car Wash (See Automobile Wash)														
Card Shop (See Gift, Novelty, and Souvenir Shop)														
Carpet Store (See Floor Covering Store)														
Catalogue Sales Store									X	X	X			
Catering Establishment								X	X	X	X	X		
Cemetery/Columbarium (Accessory Use)	11.3.18	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS			
Cemetery/Columbarium (Principal Use)	11.3.18	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS			
Child (day) Care Facilities (see Day Care Center)														
China and Tableware Shop								X	X	X	X	X		
Church/House of Worship	11.3.19	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS		
Circuses, carnivals, exhibit shows, trade shows, races, stage shows, religious events, arts and crafts shows, etc.	11.3.22										CS	CS	CS	CS
Cleaning and Maintenance Service, Building											X		X	X
Clock and Watch Sales and Repair Shop								X	X	X	X	X		
Cloth Store (See Sewing, Cloth, and Notions Store)														
Clothing, Footwear, and Apparel Store								X	X	X	X	X		

NOTES

X - Permitted Use

XS - Permitted Use With Supp. Regs.

C - Conditional Use

CS - Conditional Use With Supp. Regs.

* Reference Sect. 21 Downtown

** No designation indicates use is not permitted **

Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Clubs, Entertainment	11.3.22										CS		CS	
Coin and Stamp Shop								X	X	X	X	X		
Cold Storage Plants													C	C
College/University											C		X	X
Commercial Vehicle Storage and/or Operations Center	11.3.68													CS
Community Center	11.3.20								CS	CS	XS	XS		
Community Garden	11.3.82	XS	XS	XS	XS	XS		XS						
Computer and Data Processing Sales and Service							XS			X	X	C		
Computer Store (See Office Equipment and Computer Store)														
Conference / Convention Center										C	C		C	C
Consignment Shop (See Second Hand and Consignment Shops)														
Continuing Care Facility	11.3.23					CS		XS	XS	XS	XS			
Contractor's Office (no outside storage)							CS		X	X	X	X		
Contractors' Storage and Equipment Yard	11.3.22, 11.3.24													C S
Convenience Store (With Retail Fuel Sales)	11.3.22, 11.3.25									CS	CS	CS		
Convenience Store (Without Retail Fuel Sales)	11.3.25								CS	CS	CS	CS		
Copying Service (See Photocopying Service)														
Correctional Facility, Jails, Penal Institutions	11.3.26													CS
Cosmetics Store (See Beauty Supply and Cosmetics Store)														
Costume Rental Store (See Formal Wear and Costume Rental Store)														
Country Club		C	C	C	C	C				C	C			
Craft Shop (See Hobby, Toy, and Craft Shop)							C							
Craft Studio								X	X	X	X	X		
Crematoria													C	C
Dance School (See School for the Arts)														
Dairy, Ice Cream & Coffee Shops	11.3.21								XS	XS	XS	XS		
Day Care Center, Principal Use or Separate Use	11.3.31	CS	CS	CS	CS	CS		XS	XS	XS	XS	XS	XS	
Day Care Center, in Single Family Structure and up to 8 Children/Persons	11.3.27	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	
Day Care Center, in Single Family Structure from 9 to 12 Children/Persons	11.3.28	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	
Day Care Center, Located in Church or School, up to 50 Children/Persons	11.3.29	CS	CS	CS	CS	CS	CS	XS	XS	XS	XS	XS	XS	
Day Care Center, Located in Church or School, over 50 Children/Persons	11.3.30	CS	CS	CS	CS	CS	CS	XS	XS	XS	XS	XS	XS	
Department Store							CS				X	X		
Detective Agency								X	X	X	X	X		
Discotheque (See Lounge)														

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Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Distribution Center, Product													X	X
Doctors' and Dentists' Office								X	X	X	X	X		
Drapery and Linen Shop								X	X	X	X	X		
Drug Store (See Pharmacy)														
Dry Cleaning and Laundry Plant (Principal Use)													X	X
Dry Cleaning Service Outlet	11.3.33								XS	XS	XS	XS		
Duplex (See Dwelling, Two-family)														
Dwelling, Accessory	11.3.80	XS	XS	XS	XS	XS								
Dwelling, Manufactured (See Manufactured Home)							XS							
Dwelling, Single-Family (Site-built or Modular)		X	X	X	X	X		X				C		
Dwelling, Two-Family	11.3.32; 11.3.51				XS	XS	X	XS				CS		
Dwelling, Multi-Family	11.3.74; 11.3.51					XS	XS					CS		
Dwelling, Multi-Family Conversion	11.3.51						XS					CS		
Electronic Gaming Operations	11.3.34									CS				
Electric, Heating, Air Conditioning, Ventilating, Plumbing Sales and Service	11.3.35										CS	CS	XS	XS
Employment Agency									X	X	X	X		
Engineering, Architect or Surveying Service								X	X	X	X	X		
Equestrian Facilities	11.3.22, 11.3.36	CS	CS	CS	CS									
Event Center	11.3.85	CS	CS	CS	CS	CS	CS	CS	XS	XS	XS	XS		
Exterminators Office (See Pest Control)														
Fairground														C
Family Care Home	11.3.38	XS	XS	XS	XS									
Farm Equipment Sales	11.3.39												CS	CS
Farm Supply Store											C		X	X
Farmers' Market	11.3.81	XS	XS	XS	XS	XS		XS						
Finance Company							XS	X	X	X	X	X		
Financial Institution	11.3.22							XS	XS	XS	XS	XS		
Firing Range, Indoors													C	C
Fitness Center (See Recreation Center, Indoors)														
Flea Market (Indoor)	11.3.76									CS	CS	CS	CS	
Flea Market (Outdoor)	11.3.22, 11.3.76												CS	CS
Floor Covering Store									X	X	X	X		
Floral and Christmas Items Store								X	X	X	X	X		
Florist, Retail								C	X	X	X	X		
Florist, Wholesale											X		X	X

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Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Food Store									X	X	X	C		
Formal Wear and Costume Rental Store								C	X	X	X	X		
Fortune Teller													C	
Fraternal and Service Organization Meeting Facilities (Non-Profit and Not-for-Profit)	11.3.41							CS	XS	XS	XS	CS		
Fuel Oil Sales (See Petroleum Distributor)														
Funeral Homes										C	C	C		
Furniture Repair Shop											C	C	X	X
Furniture Store (Retail)									X	X	X	X		
Furrier											C			
Fur Storage														X
Game Room/Video Arcade	11.3.42									CS	CS			
Garden Supply and Seed Store	11.3.22										XS	XS	XS	
Gas Station (See "Automobile Service Station")														
Gift, Novelty and Souvenir Store								X	X	X	X	X		
Glass and Mirror Shop											X	X	X	
Glass Contractor													X	
Golf Course (Public or Private)		C	C	C	C									
Grain Elevator														C
Grocery Store (See Food Store)														
Group Care Facility									C	C	C			
Gun and Ammunition Sales Shop										X	X	C	X	X
Gunsmith											X		X	
Hardware Store (See "Building and Home Materials Center")														
Heating Supplies and Sales (See Electric, Heating...Supplies and Sales)														
Hobby, Toy, and Craft Shop								X	X	X	X	X		
Home Center	11.3.22										CS		XS	
Home Decorating Center									X	X	X	X	X	
Home Electronics and Appliance Sales and Repair											X	X		
Home Improvement Store (See Home Center)														
Hospitals											C		C	
Hotel/Motel	11.3.43									CS	CS	CS		
Home for Aged	11.3.60								CS	CS	CS			
Home Occupation	11.3.59	XS	XS	XS	XS	XS						C		
Independent Living Center	11.3.60						XS		CS	CS	CS			

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Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Industrial Equipment, Sales, Supplies, and Repair	11.3.44												CS	XS
Insurance Agency (Principal Use)								C	X	X	X	X		
Interior Decorator								C	X	X	X	X		
Jewelry Sales (Principal Use) and Repair								X	X	X	X	X		
Key Shop and Locksmith											X	C	X	
Laboratories - Dental, Medical, Optical, and Research	11.3.46										XS	C	XS	XS
Landfill, Demolition(Principal Use)	11.3.69													CS
Laundromat									X	X	X	C		
Laundromat Plant (See Dry Cleaning and Laundry Plant)														
Lawn and Garden Service											X		X	
Leather Goods Shop (See Luggage and Leather Goods Shop)														
Library, Public								X	X	X	X	X		
Life Care Facility (See Continuing Care Facility)														
Linen Shop								X	X	X	X	X		
Liquor Store (See ABC Store)														
Locksmith (See Keyshop and Locksmith)														
Lounge (Principal Use)	11.3.47										CS		CS	
Luggage and Leather Goods Shop								X	X	X	X	X		
Lumber and Building Materials Yard	11.3.22												CS	XS
Machine Shop	11.3.67												XS	XS
Maintenance Service (See Cleaning and Maintenance Service)														
Manufactured Goods, Class 1	11.3.67												XS	XS
Manufactured Goods, Class 2	11.3.73													CS
Manufactured Home Sales	11.3.22												XS	XS
Manufactured Homes (See MH-1 Overlay)														
Manufacturing Machinery Sales and Service													X	X
Martial Arts School									X	X	X	C		
Medical Center									X	X	X	C		
Medical Supply Shop										X	X	C		
Meeting Facility	11.3.86							XS	XS	XS	XS	XS	XS	
Membership Warehouse Club	11.3.22										CS		XS	
Message and Errand Service										X	X	X		
Mini-Mart (no gas sales)	11.3.25								CS	XS	XS			
Mini-Warehouse	11.3.48												XS	XS

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Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Mirror Shop (See Glass and Mirror Shop)														
Mixed Use	11.3.51							C				CS		
Mobile Home (See Manufactured Home)														
Modular Home (See Dwelling, Single-Family)														
Monument Sales (Principal Use)	11.3.49										XS		XS	
Monument Sales (Accessory Use)										X	X			
Motel (See Hotel/Motel)														
Moving and Storage Facilities													C	X
Multi-Tenant Development, Class I									C	C	C	C	X	X
Multi-Tenant Development, Class II									C	C	C	C	X	X
Museum								X	X	X	X	X		
Music School								C	X	X	X	X		
Music Store Sales and Service									X	X	X	X		
Nail Salon (See Tanning and Nail Salon)														
News Stand (Principal Use)									X	X	X	X		
Notions Store (See Sewing Cloth and Notion's Store)														
Novelty and Souvenir Store (See Gift, Novelty and Souvenir Store)														
Nursery (Horticultural), Greenhouses	11.3.22										CS		XS	
Nursing Home	11.3.60								CS	CS	CS			
Office Equipment and Computer Store									X	X	X	X		
Offices								X	X	X	X	X		
Optician and Optical Supply Store								C	X	X	X	X		
Paint, and Wallpaper Store (See Home Decorating Center)														
Park, Active		CS	CS	CS	CS	CS		CS	XS	XS	XS	XS	XS	
Park, Passive		XS	XS	XS	XS	XS	CS	XS						
Parking Lot - Principal Use (See Automobile Parking Lot)							XS							
Pawn Shop										C	C			
Personnel Agency (See Employment Agency)														
Pest Control Service													X	X
Pet Stores	11.3.52								XS	XS	XS	XS		
Pharmacy									X	X	X	C		
Photocopy Service								C	X	X	X	X		
Photofinish Laboratory											X		X	X
Photographic Studio								X	X	X	X	X		

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Zoning Table of Uses (Amended 7-22-14)*

USE	SUPPLEMENTAL REGULATIONS	R-1	R-2	R-3	R-4	RM-1	RM-2	OIS	C-1	C-2	C-3	C-4	I-1	I-2
Picture Frame Shop								X	X	X	X	X		
Plumbing, Sales and Supplies (See Electric, Heating...Sales and Service)														
Pool Hall (not allowed per Town Ordinance)														
Post Office									X	X	X	X		
Postal Store and Contract Station									X	X	X	X		
Printing and Publishing													X	X
Produce Stand, Temporary (Accessory Use)	11.3.53									XS		XS		
Produce Stand (Principal Use)	11.3.54									CS	CS			
Prosthetics and Medical Equipment Rental (See Rental Center)														
Prototype Design and Development	11.3.79							CS		CS	CS	CS	CS	CS
Public Safety Station	11.3.56							XS						
Public Utility Facility	11.3.37	XS	XS	XS	XS	XS		XS	XS	XS	XS	CS	XS	XS
Public Utility Transmission Lines		X	X	X	X	X	XS	X	X	X	X	C	X	X
Racetrack, Outdoor	11.3.22, 11.3.40						X							CS
Racetrack, Indoor											C		X	X
Radio Shop (See Home Electronics, and Appliance Sales)														
Radio and Television Stations											C		X	X
Railroad Terminal and Yards														C
Real Estate Agency								X	X	X	X	X		
Recreation Facility, Indoor	11.3.57							CS	CS	XS	XS	CS	XS	
Recreation Facility, Outdoor	11.3.22, 11.3.57							CS	CS	XS	XS	CS	XS	
Recreational Uses, Accessory	11.3.57	XS	XS	XS	XS	XS		XS	XS	XS	XS	XS		
Recreational Vehicle Sales	11.3.22						XS				CS		XS	XS
Recycling Deposit Station (Principal Use)	11.3.58												CS	XS
Recycling Processing Facility, (Indoors)													X	X
Recycling Station, Accessory													X	X
Repair & Servicing of Industrial Equipment/Machinery													X	X
Repair & Service Establishments over 10,000 sq. ft. in size													X	X
Rental Center, (no outdoor storage)									X	X	X		X	
Rental Center, (with outdoor storage)	11.3.71												CS	XS
Restaurant (Principal Use, Eating & Drinking Establishment)									X	X	X	X		
Restaurant, Drive-in	11.3.22									CS	CS			
Restaurant, Drive-Through	11.3.22, 11.3.61									CS	CS			
Restaurant, Fast Food	11.3.22, 11.3.61									CS	CS			

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Restaurants, Within Other Facilities	11.3.62								XS	XS	XS	XS		
Roofing Repair and Installation	11.3.63												XS	XS
Rooming and Boarding House		C	C	C	C							C		
School, Kindergarten, Elementary and Junior High	11.3.22, 11.3.55	CS	CS	CS	CS	CS		CS	CS	CS	CS			
School-Senior High	11.3.22, 11.3.55	CS	CS	CS	CS	CS	CS	CS	CS	CS	CS			
School, Vocational	11.3.22						CS	CS	CS	CS	CS	CS		
School for the Arts	11.3.22							CS	CS	CS	CS	CS		
Seasonal Outdoor Sales	11.3.64	XS	XS	XS	XS	XS		XS						
Second-Hand and Consignment Shops (no outside storage)							XS	X	X	X	X	X		
Seed Store (See Garden Supply and Seed Store)														
Septic Tank Cleaning Service													C	C
Service Station (See Automobile Service Station)														
Sewing, Cloth, and Notions Store								X	X	X	X	X		
Shoe Repair Shop								C	X	X	X	X		
Shopping Center	11.3.22, 11.3.65							CS	CS	CS	CS			
Sign and Banner Shop									X	X	X	X		
Sign Painting/Fabrication Shop	11.3.67												XS	XS
Skating Rink, Indoor and Outdoor (See Recreation Facility, Indoor and Outdoor)														
Solid Waste Vehicle and Septic Tank Vehicle Storage Facility													C	C
Sporting Goods and Apparel Shop									X	X	X	X		
Stadium	11.3.22, 11.3.66	CS	CS	CS	CS									
Stamp Shop (See Coin and Stamp Shop)														
Stationery Shop								X	X	X	X	X		
Stock or Security Brokerage Firm								X	X	X	X	X		
Subdivision Sales Office	11.3.83	XS	XS	XS	XS	XS								
Supermarket (See Food Store)							XS							
Swim Clubs	11.3.57	CS	CS	CS	CS	CS		CS	CS	CS	CS			
Swimming Pool Sales, Service and Supplies							CS				C		X	X
Tailor and Alteration Shop								X	X	X	X	X		
Tanning and Nail Salon (Principal Use)									X	X	X	X		
Tattoo Parlor										C	C			
Tavern (See Lounge)														
Tax Preparation Service								X	X	X	X	X		
Taxidermist													X	X

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Television Sales and Repair (See Home Electronics, and Appliance Sales)														
Telecommunications Towers	11.3.75	CS	CS	CS	CS	CS		CS	CS	CS	CS		CS	CS
Temporary Automobile Parking Lot for Subdivision Sales Office	11.3.84	XS	XS	XS	XS	XS	CS							
Temporary Construction Trailer/Structures	11.3.70	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS	XS
Textile Machinery Sales and Service							XS						X	X
Theater, Indoor Movie										C	C	C		
Theater, Outdoor Movie	11.3.22										CS			
Tire Recap or Repair Facility	11.3.38													CS
Tobacco Shop								X	X	X	X	X		
Toy Shop (See Hobby, Toy, and Craft Shop)														
Trading Stamp Redemption Store											X			
Trading and Conference Center											C			
Travel Agency								X	X	X	X	X		
Trophy and Plaque Shop									X	X	X	X		
Truck Terminal														C
Truck and Utility Trailer Rental Facility (Principal Use)														C
Truck Washing Facility														C
Upholstery Shop											X	X	X	
Variety Store									X	X	X	X		
Vending Company Supply House													X	X
Veterinary Office (See Animal Hospital)														
Video Arcade (See Game Room)														
Video Rental Shop (Principal Use)									X	X	X	X		
Warehouse (Excluding Wholesales Sales Operations and Mini-Warehouses)													X	X
Watch Repair and Sales (See Clock and Watch Sales and Repair)														
Welding Shop	11.3.67												CS	XS
Wholesale Sales Operation										CS	CS		XS	XS
Wrecker Service (See Automobile/Vehicle Towing Service)														

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V. Old Business

B. Petition TA-003098-2015

Request by Staff, on behalf of the Board of Commissioners, to amend Section 16.1.9 (Effect of Denial on Subsequent Petitions) and Section 16.2.11 (Twelve-Month Limitation on Re-Application) of the Waxhaw Unified Development Ordinance to revise the requirements with regard to the twelve-month resubmission period on re-application after a denial of a rezoning or conditional rezoning application by the Board of Commissioners.

Presenter: [Chris Rice](#)

Information

A public hearing was held at the March 10, 2015 meeting for Petition TA-003098-2015 which would eliminate the twelve-month delay on resubmission of denied zoning amendments under certain circumstances.

On February 23, 2015, the Planning Board voted (6-1) to send a favorable recommendation to the Board of Commissioners on TA-003098-2015. Staff recommends approval of TA-003098-2015.

Board Action

- Possible action on Petition TA-003098-2015 to amend Section 16.1.9 and Section 16.2.11 of the UDO as proposed. The Board should move forward with approval or denial of the Petition.



STAFF REQUEST TO PLACE ITEM ON BOARD AGENDA

Date of Meeting: March 10, 2015

Department Requesting: Planning and Community Development

Staff Member Requesting: Chris Rice

Case #: TA-003098-2015

Brief Summary of the item:

Petition TA-003098-2015 is a request by staff, on behalf of the Board of Commissioners, to amend Section 16.1.9 Effect of Denial on Subsequent Petitions and Section 16.2.11 Twelve-month Limitation on Re-application of the Waxhaw Unified Development Ordinance to revise the requirements with regard to the twelve-month resubmission period on re-application after a denial of a rezoning or conditional rezoning application by the Board of Commissioners.

Attachments Included:

- Application
- Staff Report
- Proposed Text Amendment
- Draft of February 23, 2015 Planning Board Minutes containing recommendation of item.
- _____
- _____
- _____
- _____
- _____
- _____

Date submitted to Town Clerk: 3/2/2015



Town of Waxhaw
 Planning & Community Development
 PO Box 617
 Waxhaw, NC 28173
 704-843-2195 (Phone)
 704-243-3276 (Fax)
 www.waxhaw.com

Date Received
January 14, 2015
Received By
Chris Rice
Fee
N/A

TEXT AMENDMENT APPLICATION

Date of Application: January 14, 2015 Application Number: TA-003098-2015
(completed by staff)

Applicant Information

Applicant Name: Town Staff on behalf of the Board of Commissioners

Applicant Address: 1150 N. Broome Street, Waxhaw, NC 28173

Applicant Email Address: crice@waxhaw.com

Applicant Telephone: 704-843-2195

Type of Change: New Addition _____ or Revision X

Ordinance Section: Section 16.1.9 and Section 16.2.11

Current Text: See attached.

Proposed Text: See attached.

Reason for requested change (attach additional sheets if necessary): Board of Commissioners
requested amendment to allow for the waiving of the required twelve-month period on re-submitting
a petition for rezoning or conditional rezoning after an application has been denied.

I do hereby certify that all information which I have provided for this application is, to the best of my knowledge, correct.

Chris Rice
 Signature of Applicant

1/14/15
 Date

All of the information herein required has been submitted by the applicant and is included or attached with this application

Lori Collier
(Signature of Zoning Administrator)

1/14/2014

(Date)

TO BE FILLED OUT BY ZONING ADMINISTRATOR

Completed application submitted on: 1/14/15

Reviewed by Planning Board on: 2/16/2015

Action of Planning Board: Voted 6 to 1 to send favorable recommendation to Board of Commissioners. Planning Board Member Burrell dissented. He would like to see language requiring Board of Commissioners to make decision.

Town Board Public Hearing Held On: March 10, 2015

Date of Town Board Decision: _____

Action Taken by Town Board: _____

***Newspaper Affidavit should be attached**

Public Hearing Notice Filed in: Enquirer - Journal
(Name of Newspaper)

Date(s) Notices Published: 2/27/15 and 3/6/15

Text Amendment TA-003098-2015
Revisions to Section 16.1.9 Effect of Denial on Subsequent Petitions and Section 16.2.11
Twelve-Month Limitation on Re-application

EXPLANATION OF THE REQUEST

Petition TA-003098-2015 is a request by staff, on behalf of the Board of Commissioners, to amend Section 16.1.9 Effect of Denial on Subsequent Petitions and Section 16.2.11 Twelve-month Limitation on Re-application of the Waxhaw Unified Development Ordinance to revise the requirements with regard to the twelve-month resubmission period on re-application after a denial of a rezoning or conditional rezoning application by the Board of Commissioners.

STAFF REQUESTED UDO CHANGES

Section 16.1.9 Effect of Denial on Subsequent Petitions (See attached language.)

Section 16.2.11 Twelve-Month Limitation on Re-application (See attached language.)

PLANNING STAFF ANALYSIS

Currently the Unified Development Ordinance does not allow for submission of a similar rezoning application or conditional rezoning application or resubmission of a revised application prior to the expiration of a twelve month resubmission period after a denial by the Board of Commissioners. The only opportunity to avoid the twelve month resubmission period is in the case of a conditional rezoning request that has been significantly changed.

During consideration of a previous application by the Board of Commissioners, it was determined by the Board that there may be certain instances where the twelve month resubmission period on an application or re-application should be waived after a denial. The Board of Commissioners instructed the staff to draft a text amendment that would address this issue. Staff researched other municipalities in North Carolina to find out if they waive the requirement under certain conditions and several municipalities had criteria for waiving the resubmission period. All of them used similar criteria when determining whether to waive the requirement or not. The text amendment draft incorporates these criteria into Section 16.1.9 and Section 16.2. The proposed text amendment, if approved, will give the Administrator the authority to waive the twelve month restriction period if one or more of the following has occurred:

- A. There has been a significant change in the zoning district classification of an adjacent piece of property.
- B. The Town has adopted a plan that changes policy regarding how the property affected by the amendment should be developed.
- C. Construction or expansion of a road, water line, sewer line, or other such facilities has occurred to serve the property and can comfortably accommodate the intensity of development allowed under the proposed classification.

PLANNING STAFF RECOMMENDATION

Staff recommends approval of TA-003098-2015. The proposed revisions to Section 16.1.9 and Section 16.2.11 will allow the Administrator to waive the twelve month resubmission period if certain criteria are met.

PLANNING BOARD RECOMMENDATION

The Planning Board, at their February 23, 2015 special called meeting, voted (6-1) to send a favorable recommendation to the Board of Commissioners on TA-003098-2015. Mr. Burrell voted against the recommendation. He believes the text amendment should be revised so the Board of Commissioners will be responsible for making the decision whether to allow for re-application prior to the expiration of the twelve month re-application period. He said that this determination should be made after the Administrator has relayed to the Board of Commissioners that one of the three conditions has been met. He also recommended a fourth condition be added to require the Board of Commissioners to have staff initiate an application prior to the expiration of the 12 month re-application period if the Board of Commissioners realizes a mistake was made during consideration of an application that was denied.

Submitted by: Chris Rice, Planner II

Amendments to Section 16 of the Unified Development Ordinance

16.1.9 Effect of Denial on Subsequent Petitions

When the Board of Commissioners shall have denied a map application or the application shall have been withdrawn after the first notice of the public hearing thereon, the Board of Commissioners shall not entertain another application for the same or similar map amendment, affecting the same property or a portion of it until the expiration of a one year period, extending from the date of denial or withdrawal, as applicable. ~~Provided, however, one additional application may be made before the expiration of the one year period~~ This waiting period shall not be applicable for the same property or a portion of it if the first application was not for a Conditional Zoning District and the second application is for a Zoning District designated as a Conditional Zoning District or the Administrator determines at least one of the following has occurred:

- A. There has been a significant change in the zoning district classification of an adjacent piece of property.
- B. The Town has adopted a plan that changes policy regarding how the property affected by the amendment should be developed.
- C. Construction or expansion of a road, water line, sewer line, or other such facilities has occurred to serve the property and can comfortably accommodate the intensity of development allowed under the proposed classification.

16.2.11 Twelve-Month Limitation on Re-application

If a request for rezoning to conditional zoning is denied by the Board of Commissioners, a similar application for the same property or any portion thereof shall not be filed until the expiration of a twelve (12) month period from the date of the most recent denial by the Board of Commissioners. This waiting period shall not be applicable where the application for a conditional zoning is substantially different from the original application or the Administrator determines that at least one of the following has occurred:

- A. There has been a significant change in the zoning district classification of an adjacent piece of property.
- B. The Town has adopted a plan that changes policy regarding how the property affected by the amendment should be developed.
- C. Construction or expansion of a road, water line, sewer line, or other such facilities has occurred to serve the property and can comfortably accommodate the intensity of development allowed under the proposed classification.

The term "substantially different" as herein applied shall mean:

- A. The proposed principal use is different than the use contained in the original application; or
- B. The gross floor area of the proposed development is fifty (50) percent or more smaller than contained in the original application.

**Minutes of the Waxhaw Planning Board
Town of Waxhaw, NC
February 23, 2015**

The Waxhaw Planning Board met in a special session Monday, February 23, 2015 at 6:30 p.m. at the Waxhaw Police Department Community Room.

Special Called Meeting

1. Call to Order

Chairman Godfrey called the meeting to order at 6:30 pm.

2. Roll Call and Determination of Quorum

A roll call and determination of quorum was made.

Present: Chairman Godfrey, Vice-Chairman Underwood, John Cannamela, Michael Kreimer, Fred Burrell, Thomas Dwyer, Bob Morgan, Dan Gingrich (not seated), Staff McCarter, Staff Rice, Staff Oakley, Interim Manager Mahar, and Recording Secretary Oliver.

Absent: James Mathieson

3. Work Session

NONE

4. Unfinished Business

NONE

5. New Business

- A. RZ-003080-2015 - A request by McCray Smith, on behalf of Cray, Inc., for a rezoning/map amendment on parcel 06-138-001 from R4 (Single-family Residential) to C1 (Neighborhood Commercial) located at 3808 S. Providence Road.

Staff McCarter gave a presentation on RZ-003080-2015 (see attached).

Ken McCoy stated that he was a resident of the Oaks neighborhood. He stated that he had four points he would like to stress when considering the proposed rezoning. First he stated that there are over 100 homes in the Oaks and multiple drivers per home and that traffic is a real concern. He stated that he was concerned that the proposed rezoning would worsen traffic at the intersection of Red Oaks Trail and Highway 16. He stated that he appreciates bringing business to Waxhaw but that the rural nature of the

town drew him and his family to Waxhaw and he would like to preserve the rural character. Ken McCoy stated that he felt that the rezoning is not in keeping with Waxhaws future land use plan. He stated that he felt neighborhoods need protection by the town because they already suffered from decreased property values due to an unfavorable school district redistricting.

James Miller stated that three years ago there was a rezoning two doors down with the B&H Holding rezoning. He stated that he can appreciate that the owner would like to rezone his property to commercial but feels the owner just wants to increase the value of his property. He stated that that he is concerned with traffic and asked for the Planning Board to consider a traffic impact study. James Miller stated that if all the commercial property in the area was developed it would be a traffic nightmare. He stated that he was against the proposed rezoning.

Kevin Leebrick stated that at the intersection of Red Oaks Trail and Highway 16 it is very difficult to make a left turn. He stated that if the rezoning is approved that he would like to see a condition placed on the approval that an easement would be created on the property for a neighborhood sign for The Oaks.

Mark Thompson stated that that he has lived in The Oaks for 19 years. He stated that many people enjoy walking on the neighborhood streets and stated that the traffic is dangerous. He stated that the owner has gutted the house and turned it into an office and that he has been selling cars out of his house and that he has many cars that are unlicensed stored at the house.

McCray Smith, the applicant, stated that he loves Waxhaw and wants to make it as great as it can be and that he has several investments in the town. He stated that he has sold two vehicles out of the garage at that house in the past month and that is all he has ever sold. He stated that Providence Road is the busiest road in the town and that there are traffic problems associated with the road. McCray Smith stated that he has neighbors that would also like to rezone their property and that he has tried to buy the houses next door but could not afford the asking price. He stated that he has a verbal agreement with an insurance company to use the property for an office if the proposed rezoning is approved. He stated that the proposed office use would create very little traffic.

Thomas Dwyer asked if the proposed office would have its own entrance off of Highway 16. Staff McCarter stated that NCDOT would require a driveway permit to allow a driveway cut in that location. She stated that it would only have access via Red Oaks Trail.

Fred Burrell asked if the property owners were formally notified via US mail about the rezoning petition. Staff Oakley stated that the adjoining property owners were not notified via mail because adjoining property owner notices are not required prior to the

Planning Board hearing. She stated that staff did post a rezoning sign on the property and that it was prior to the time period required by state statutes.

Fred Burrell stated that the Comprehensive Plan is being rewritten and that the updated plan would most likely call for a new Unified Development Ordinance (UDO) to be written following the completion of the Comprehensive Plan. He stated that the Highway 16 Corridor Plan is very good and looks at the road as a whole. He stated that the traffic is a problem and that he believes it should be a requirement of the UDO to conduct a traffic impact study and he would like to require a traffic study prior to the consideration of the rezoning petition. He stated that he envisioned commercial zoning in that area along Highway 16. Fred Burrell stated that the problem with approving multiple isolated rezonings is that there is not a comprehensive view of the effects that the rezonings will have on the area. He stated that the proposed rezoning does not agree with corridor plan because the parcel by parcel consideration of rezonings are too fragmented.

McCray Smith stated that all but three parcels along Highway 16 in the area around his property are commercially zoned. Fred Burrell stated the proposed rezoning petition is a little too early to look at the area comprehensively.

McCray Smith stated that that all commercial properties along Highway 16 have residential properties abutting them. He stated that his property is very small and would have little impact compared to other properties along Highway 16.

Staff Mahar stated that the NCDOT would allow a curb cut for the property and the location would be determined by the NCDOT.

An audience member stated that the B&H Holdings rezoning, that is north of the property in question, was approved for a right-in-right-out driveway on to Highway 16 and there would be a traffic signal installed at the entrance to Alma Village to help ease traffic issues. Staff Mahar stated that that the information stated is correct but that the driveway configuration has yet to be determined and that it would be determined based on the use.

Fred Burrell motioned to send an unfavorable recommendation for RZ-003080-2015 to the Board of Commissioners. John Cannamela seconded. The motion passed unanimously, (7-0).

Fred Burrell stated that the rezoning petition is not consistent with the recommendations of the Highway 16 Corridor Plan because fragmented rezonings would lead to more and more driveway cuts onto Highway 16 further contributing to traffic problems with driveway access and traffic concerns at the intersection. He stated that the Comprehensive Plan and the UDO are not yet to a point where they would provide proper protections to residential properties with buffer and screening

requirements because the request would allow any use permitted in the C-1 zoning district and would not protect the neighborhood.

- B. TA-003098-2015 - A request by staff, on behalf of the Board of Commissioners, to amend Section 16.1.9 Effect of Denial on Subsequent Petitions and Section 16.2.11 Twelve-month Limitation on Re-application of the Waxhaw Unified Development Ordinance to revise the requirements with regard to the twelve-month resubmission period on re-application after a denial of a rezoning or conditional rezoning application by the Board of Commissioners.

Staff Rice gave a presentation on TA-003098-2015 (see attached).

Thomas Dwyer asked about the proposed text amendment and how it would affect applications that met one but not all three of the conditions outlined. Staff Rice used the Andover Chapel rezoning petition as an example.

Vice-Chairman Underwood asked if there were any outstanding cases that would be affected by this text amendment. Staff Rice stated that there were.

Fred Burrell stated that he felt the proposed text amendment is a good idea but he would like to see it written in a way that was a little more black and white. He stated that the Zoning Administrator should notify the Board of Commissioners if an applicant meets any of these conditions. He stated that he wants to avoid gray area in the wording and that having black and white regulations would be better for development.

Chairman Godfrey stated that he is not sure how he feels about the Board of Commissioners making the decision and not utilizing the expertise of planning staff.

Fred Burrell stated that he feels a fourth condition should be added stating that if the Board of Commissioners finds that they would like to reverse one of their rezoning denials that the applicant should not have to wait 12 months to resubmit. He stated that the Board of Commissioners should decide as a group whether or not to ask the applicant to present the case again. Staff Rice asked if the Board of Commissioners would instruct staff to initiate a new application for the applicant. Fred Burrell stated that the Board of Commissioners would instruct staff to initiate a new application.

Staff Mahar stated that he disagrees with adding a fourth condition. He also stated that Attorney Spencer has reviewed the proposed text amendment with staff and that it has been looked at from many different angles. He stated that the Zoning Administrator should be able to make the determination.

Chairman Godfrey stated that he feels that the town's boards and committees need to have confidence in staff to make decisions.

John Cannamela motioned to send a favorable recommendation for TA-003098-2015 to the Board of Commissioners. Bob Morgan seconded. The motion passed six to one, (6-1).

Fred Burrell opposed the motion.

Fred Burrell stated that the reason that he opposed the motion is that conditions should be more black and white. He stated that if two or three of the conditions are met that it should automatically be brought to attention of Board of Commissioners and if the Board wishes to reverse one of their rezoning decisions, that the Board of Commissioners should be able to instruct staff to initiate a new application and the case should be heard again.

6. Other Business - Update on previous case(s) heard by the Planning Board

Staff Oakley stated that the Berger Daycare case was approved by the Board of Commissioners. She stated that the Waxhaw Park CUP revision was also approved with the condition that a church use not be included.

7. Minutes for correction and approval: January 20, 2015 regular meeting

Michael Kreimer motioned to approve the minutes from the January 20, 2015 special meeting. Thomas Dwyer seconded. The motion passed unanimously, (7-0).

Chairman Godfrey stated that Planning Board members should be mindful of their actions and all members are representing the Planning Board and that members should be respectful of that at all times.

8. Adjournment

Michael Kreimer motioned to adjourn the meeting at 7:14 p.m. Thomas Dwyer seconded. The motion passed unanimously, (7-0).

The meeting adjourned at 7:14 p.m.

Respectfully Submitted,

Chairman, David Godfrey

Recording Secretary, Maxx Oliver

Draft



V. Old Business

C. Discussion and Possible Action on Key Financial Strategies

Presenter: Jim Prosser

Information

Key Financial Strategies is a process that combines financial planning with strategic planning. Its primary purpose is to provide a disciplined framework for decision-making required to identify and implement strategies required to achieve the Town's vision and assure long-term community viability. This financial plan will reflect the opportunities and challenges required to achieve that result.

Board Action

- Possible approval of Key Financial Strategies.



Financial Management Plan

Fiscal Year 2014 - 2015

Prepared by: Centralina Council of Governments

3/17/2015

Key Financial Strategies is a process that combines financial planning with strategic planning to provide a framework for decision-making that aligns with the Town's vision and assure long-term community viability.

Waxhaw, North Carolina Key Financial Strategies

Key Financial Strategies is a process that combines financial planning with strategic planning. Its primary purpose is to provide a disciplined framework for decision-making required to identify and implement strategies required to achieve the Town’s vision and assure long-term community viability. This financial plan will reflect the opportunities and challenges required to achieve that result. Some illustrative examples of these opportunities and challenges include:

Opportunities and Challenges

- 1. Developing and funding of Town operating systems.** Waxhaw is a rapidly growing residential community. Elected officials and staff recognize that residents are attracted to the Town because of its unique historical and “hometown” characteristics, high service level and proximity (yet separate identity) to Charlotte. Elected officials and staff recognize that transitioning systems to support the residential growth, desire for diversification of tax base, constructing infrastructure required to serve existing and attract new development, and capitalize on unique historic community character will require development of a plan to identify the staffing requirements to support these needs. Understanding that form follows function, it will be important for the elected officials to identify the key functions that will be required of staff. The Town Manager, will be able to use this information to prepare and prioritize plans for what type of staff will be required and how best to organize and fund the staff departments and operations. Failure to identify and adequately fund core services and systems essential for Town operations will have severe long-term consequences, particularly in a fast growth community.
- 2. Developing a “cost-to-serve” model aligned with Town operating and facility needs.** The Town has done an exceptional job of preparing plans for a wide variety of investments needed to support future growth and community success (Town Hall, Town Center, Parkway Improvements, Community Center, Public Services facility, water, stormwater, roads, curb and gutter, street lights, parkway trees, paths and parks) which will require reinvestment or replacement over the next decade. Maintenance, scheduled replacement and upgrading of many of these assets which had been previously deferred created increased operating costs and reduced the Town’s ability to adequately serve the public. Independent studies support the belief that investment in government infrastructure serves as an economic stimulus. The challenge recognized by the Town is how to develop a strategy to support the financing and operation of these improvements. A cost-to serve model will identify cost to serve various types of development (including operating and infrastructure costs). This model, together with revenue projections for specific development types will inform officials with essential data to support establishing financial

oversight and long-term financial decisions. With this data, the Town will be able to identify the right mix and character of development that will optimize their ability to sustain long-term financial stability.

3. **Diversification of Tax Base.** Waxhaw’s location within the region supports the potential for diversification of tax base. Choosing a greater mix of commercial and industrial (C/I) development may have a positive impact on tax rates. However, specific and strategic policy decisions will be required if the Town is to achieve and realize the benefits of this diversification. The proper mix of C/I development typically provides more revenue than expenses. Achieving this result is best accomplished if the effort is intentional and directed by elected officials. Decisions to support greater diversification include land use designation, funding staff to support economic development and identifying infrastructure needed to support C/I development.
4. **Over-reliance on property taxes to support general fund operations.** Waxhaw is projecting rapid growth of their residential neighborhoods. Property taxes represent 60% of general fund operating revenue. Best practices for towns indicate the need for greater revenue diversity with at least four major revenue sources and no one source representing more than one-third of total revenues. Understanding the cost to serve residential development is critical to the Town’s long term financial stability. Specifically, developing the fiscal impact of the cost to serve various types, locations and values of housing compared to projected revenue derived by the Town will provide valuable data to support policy decisions regarding land use and development. In addition, identifying the investments in maintenance programs required to assure the long-term functionality of existing residential neighborhoods (i.e. property maintenance codes and enforcement) should be considered. This is of critical importance because failure to assure continued value growth of residential properties could significantly undermine future tax base.

Financial Goals

The Town of Waxhaw has set the following financial goals:

1. Provide the level of service requested from Citizens while maintaining a low tax rate competitive with similar municipalities within the region
2. Develop staff departments to meet growing size and complexity of mid-size Town.
3. Maintain responsiveness to various economic conditions as well as having sufficient reserves (currently reserves should be maintained at 25% of next fiscal year operating budget).
4. Continue to look at revenue sources other than property taxes to fund Town projects.
5. Preserve and enhance historic portion of Town by aggressively leveraging Federal, State and private organization resources

6. Establish financial framework required to build and extend the life of existing infrastructure/facilities and providing for timely replacement and maintenance of infrastructure/facilities as needed.
7. Use economic development to continue growing a diverse property tax base and customers, which will lead to long-term community affordability, livability, and stability.
8. Continue to revise and update core Town services and amenities.

Comprehensive Financial Management Plan

A Comprehensive Financial Management Plan identifies potential financial needs of the Town by reviewing financial projections and discussing priorities for the community. In addition, the Town Board will conduct annual goal setting sessions to help frame issues of importance to the community.

OBJECTIVES FOR THE FINANCIAL PLANNING PROCESS:

A financial plan is a necessary element of Waxhaw’s strategy to remain competitive in today’s demanding environment. The Town’s Key Financial Strategies will provide a road map into the future and a framework for future decision-making. Objectives of the Town’s Key Financial Strategies are:

- Establishing a common understanding among the elected officials and staff of the Town’s needs and financial capacity.
- Developing a comprehensive view of financial resources and options.
- Identifying Town issues and opportunities.
- Creating a framework in which elected officials and staff can make immediate and long-term investment decisions.
- Developing a consensus among the elected officials and staff on key actions the Town will take to remain competitive.
- Providing a framework for forecasting long-range financial planning issues to the public.

Annual Commitment to Financial Management Plan

Key financial strategies will require the Town Board to review updates as part of (or prior to) annual goal setting/strategic planning. Results from annual goals will be incorporated into an updated key financial strategy and will be used to guide preparation of the annual budget.

Key Financial Strategies is a process that requires a specific commitment to reviewing and updating this financial plan on an annual basis with the focus on the following:

- Development and update of goals and strategies directed at achieving Waxhaw’s Community Vision.
- Review of staff-prepared projections for the cost to maintain current level of services given projected growth.
- Development of measures to evaluate fiscal impact which could include cost of service models, impact fees and fiscal impact analysis for new development.
- Review capital improvements required to maintain or replace infrastructure and facilities.
- Analysis of the impact of adding new services and facilities on the tax rate and fees.
- Periodic community surveys to determine public assessment of the value and need for the current level of services.
- Identification of a select number of new goals and initiatives for needs assessment, study, or implementation.
- Continued assessment of the type and level of services provided and service delivery methods.
- Development of direction to staff to prepare specific strategies for future years.

FINANCIAL PRINCIPLES

This financial plan reflects the following Financial Principles reflecting existing community practices.

1. **Support and enhance unique historical and “hometown” community character in a period of rapid growth** – The character of Waxhaw is preserved and enhanced by the specific decisions and actions of its elected officials. Respecting that fact requires Waxhaw to incorporate strategies into its financial planning process that further this principle. Financial decisions must reflect factors beyond year-to-year budget decisions. As an example, capital expenditure can be evaluated on the basis of how they will assure maintaining and enhancing community character over the long-term. Other efforts include establishing policies and practices that promote safe and livable neighborhoods, enhance urban design by focusing on reducing auto trips and promoting alternates including trail and transit systems, supporting environmentally sensitive design, protecting natural resources, promoting in-fill development and redevelopment, and avoiding the costs of “sprawl” development.
2. **Long-term Community Affordability** – Long-term community affordability requires a balancing of tax impact and spending for both operating and capital investment. Tax impacts must be carefully analyzed as part of spending and investment decisions. Attention to diversifying a tax base that supports Town operating costs and investments is a key element to assuring community affordability. Use of an established financial plan that includes a projection of operating and capital costs, community survey and comparable community analysis are useful tools for that

purpose. It is especially important to evaluate the impact of delaying needed investment and maintenance on future operating costs.

3. **Competitive and Responsive Community Services** – As Waxhaw grows, the needs of those served will change as well. Introducing the operational systems and staffing needed to support a full-service medium size town will be an important priority. The ability to refine both the services and methods of service delivery to reflect the needs of those served by the Town is critical to maintaining a competitive edge and maintaining community affordability. This means that the Town will need to modify or eliminate services in order to find the resources needed to support new services.

4. **Protecting Community Investment and Value** - Protecting and enhancing the value of residential and commercial property is a primary responsibility of Town Officials. Community property values reflect not only the investment and re-investment of individuals but public investments as well. Public investments in public infrastructure and leveraging private investments are required community investment strategies. Towns with deteriorating or inadequate infrastructures frequently experience loss of market value and tax base. Likewise towns with deteriorating commercial or residential properties find that nearby properties are unlikely to reinvest in their properties. Reversing these trends is typically very difficult and expensive. Strategies that target investments and reinvestments on a timely basis are key components to this practice.

FINANCIAL ASSESSMENT – FINDINGS & RECOMMENDATIONS

The financial assessment conducted of the Town was divided into four Strategic Focus Areas corresponding to the Town’s long-term financial principles. The assessment provides a framework for preparation of the financial plan and subsequent strategies. This section summarizes information prepared and discussed at Board and staff workshops.

1. Support and enhance unique historical and “hometown” community character in a period of rapid growth

1.1. General Development – Waxhaw is a rapidly growing community with a current population of about 12,000 within an area of roughly 13 square miles. The community has unique historic downtown and carefully cultivated “hometown” characteristics. Waxhaw has experienced rapid residential growth, which was briefly interrupted by national market conditions. That is rapidly changing and the Town is taking very specific action to guide future development to assure maintaining its valued character.

Recommendations:

1.1.1. Identify and fund a “true budget” for core services required to meet the needs of services currently provided, maintain existing infrastructure and effectively manage projected growth.

1.1.2. Prepare a cost-to-serve and fiscal impact model as a basis of providing better data to elected officials regarding the cost of new development compared to revenue generation.

1.1.3. Identify and prioritize infrastructure requirements and costs for development areas. Use this information to encourage development within those areas that will provide lower cost to serve and more rapid recovery of Town funded up-front infrastructure costs.

1.1.4. Identify areas of potential in-fill development that will minimize cost of new infrastructure and service delivery areas.

1.1.5. Establish a growth management strategy based on results of items above.

1.2. Housing Development – Waxhaw has a solid base and range of residential housing and should continue to encourage a range of housing types and prices points. The projected rapid growth in housing will likely determine the range of housing options available for the next several decades. With that in mind, assessing the needs of those currently living in Waxhaw for housing options that will serve them in the future (i.e. various types of senior housing) may be of value. Additionally, understanding the housing needs of employers within and nearby the Town may provide data to help assure that the mix of housing will serve the community over the long-term.

Recommendations:

1.2.1. Prepare a community-based housing strategy based on market data, and resident and employer input.

1.2.2. Focus “passive” development incentives on those developments that meet the community based housing strategy goals.

1.3. Housing Value – Housing is well maintained, however the challenges of maintaining properties as they age are well known. Continued reinvestment in residential properties should be an essential element in the Town’s financial strategy. Poorly maintained properties can lead to disinvestments which can, in turn, influence the transition of adjacent properties.

Recommendations:

1.3.1. Single Family Redevelopment and Rehabilitation

- Promote programs to rehabilitate existing single-family homes; repair, maintain, improve, and expand.*
- Identify and coordinate resources that provide households with support for home repair and maintenance.*
- Consider property maintenance codes.*

2. Long Term Community Affordability

2.1. Tax Rate – Waxhaw’s tax rate is among the lowest among comparable communities. The Town has clearly been a good steward of public funds and has developed a fund balance to support future investments required for Town growth. It is the intent of the Town Board to continue to maintain a low tax rate. Significant limitations exist in North Carolina for options for revenue diversification. Therefore, even with the fund balance, there may be a time when adjustment to taxes is needed to support required investments.

Recommendations:

2.1.1. Conduct annual community surveys to assess resident perception of value of services and tax rate impacts.

2.1.2. Design communication tools that provide information on Town programs, capital expenditures, and services. The communications will strive to increase public participation in key financial decisions and clearly convey the financial situation of the Town. Examples include Open Houses, Citizen Academies, and web-based surveys.

2.1.3. Develop a means to educate Town stakeholders regarding Town finances.

2.1.4. Evaluate options to use existing fund balance to “bridge” debt service payments required for investments required for growth. This will permit the tax base to grow to absorb the debt service impacts over time.

2.2. Budget Review/Performance Measures – Department operating impacts due to growth, policy decisions, changes to operations, and limited revenue sources have not been identified in a timely manner.

Recommendations:

2.2.1. Review performance measurements to determine if the Town is achieving the results that are important to the Town.

2.2.2. Provide demographic statistics that compare per capita income, per household income, and per capita taxable valuation. These measures will help measure the financial condition of the Town.

2.2.3. Determine appropriate increase per year to tax levy (i.e. % of increase or levy limit).

2.2.4. Determine appropriate allocation of property tax subsidy to departments.

2.3. Market Value – Town assessed value of \$1.3 billion has been increasing steadily an average of 5% per year over the past four years. The Town has a per capita market value of \$109,114.00. The per capita market value is a good indicator of community affordability. While there is a tendency to focus on population as a factor in community viability, per capita market value is a better indicator of financial viability. This is an important indicator because generally, the higher the relative value, the less the impact on individual taxpayers. Currently the ratio of residential property to total value is about 1:1. Even a small shift in the trends in the residential values has significant impacts on tax revenues. Regardless of the financial impact, enhancing housing values is a key indicator of strong communities. The Town has a tax base (taxable value) with 91% residential and 9% commercial/industrial/utilities. Careful consideration should be given to the appropriate balancing of future development. Quality and diversification of housing and commercial/industrial development should be carefully evaluated in order to assure that Waxhaw will be able to achieve its “vibrant urban hometown” vision.

Recommendations:

2.3.1. Establish a goal, strategies, and performance metrics in support of a tax base diversification level appropriate for Waxhaw. Per capita market value will measure effectiveness of development efforts and be incorporated into the financial planning process.

2.4. Economic Development Initiatives – The Town has indicated a desire to increase economic development efforts. This focus will permit expanded tax base diversification; improve quality of life by providing increased access to jobs and amenities.

Waxhaw is well positioned to accept a variety of commercial, residential and service development to the community. Developing specific strategies and resources to achieve Town goals will accelerate that effort and reduce the risk of attracting development not compatible with Town goals.

Recommendations:

- 2.4.1. Direct the establishment of a position or department to support economic development*
- 2.4.2. Establish economic development goals, strategies, and policies updated by the Town Board on an annual basis.*
- 2.4.3. If provided, development assistance should be focused on investments that meet specific Town economic development goals. Assistance should be limited to the amount needed to provide the developer or investor with a reasonable rate of return.*

3. Competitive and Responsive Community Services

- 3.1. Service and Programs** – As Waxhaw grows, the needs of those served change as well. The Town has recently established a Recreation Department to address those needs. This action recognizes the increased demand for programs and recreation amenities for youth and families. At the same time, the fastest growing age group in Union County is those over 65. According to current research both of these sectors place a high value on exercise and fitness and will be seeking programs and facilities responding to those needs. The general aging-in-place will impact all departments to various extents. The Town will need to better understand the changing needs and amenities required to meet the needs of current and new residents to the community and adjust the programs periodically. It will be necessary to plan ahead of these trends to make sure services are tailored to population needs. The ability to develop both the services and methods of service delivery to reflect the needs of those served by the Town is critical to maintaining a competitive edge and maintaining community affordability. Additionally the Town will need to build the recreation infrastructure and staff required to provide this programming.

Recommendations:

- 3.1.1. Develop a ten-year plan to gradually build the infrastructure required to meet the needs of a growing residential population. This plan should include operating costs and cost-recovery systems for operating costs required to maintain these programs*
- 3.1.2. Evaluate the needs for recreation and other services through systematic use of surveys, focus groups, and customer satisfaction.*

3.1.3. Identify partners for the provision of services and facilities to serve the needs of a growing diversity of service requirements

3.1.4. Identify staff training opportunities to successfully interact with all residents regardless of age or ability in order for the Town to remain competitive and responsive.

3.2. Recruit, Retain and Develop Quality Employees – The Town is building a staffing structure to compete with other full service, high amenity communities. This will develop into a highly diverse service organization. With some notable exceptions, most work performed by the Town will be labor intensive. Employing sufficient employees with specialty requirements, the Town faces significant challenges and stiff competition for skilled workers. The recruitment profile for the many specialized fields has changed significantly over time. It will be necessary to review the traditional model for public sector employment in terms of skills, diversity, education, abilities and attitudes. The Town should consider investing in systems to help improve employee performance including employee performance reviews, leadership training and development programs.

Recommendations:

3.2.1. Invest in training and education to improve employee development opportunities. This could include learning management systems to track high performing employees, training requirements and development needs, performance appraisals and development plans from hire to retire.

3.2.2. Review options to introduce or enhance technology to reduce workload requirements and improve employee performance. Examples include; GIS systems for enhanced public safety information and response and infield reporting for all operating units.

3.2.3. Review alternative pay plans such as merit pay to reward high performing employees.

3.2.4. Use psychometric tools to assess candidates for employment ability to provide high-level customer service and teamwork.

4. Protecting Community Investment and Value

4.1. Pavement Management System – In order to prolong the useful life of Town owned streets a pavement management system that supports the longevity of pavement is needed. Currently, it does not appear that sufficient enough money is allocated to adequately maintain the existing lane-miles of public streets in Waxhaw. Streets in poor condition can give the impression of unsafe neighborhoods and lack of community vibrancy, as well as increasing street maintenance operating costs.

Street maintenance is most cost-effective with aggressive resurfacing and maintenance of the existing pavements. The best approach is to annually maintain the resurfacing and sealing of existing street pavements to avoid replacement costs. When maintenance is deferred, the street pavement eventually becomes unfixable by resurfacing and the cost for replacement is significant.

The following are the life expectancies of typical urban streets. These streets can be assumed to need full replacement at the end of their life expectancy and major rehabilitation midway through.

<u>Street Classification</u>	<u>Typical Lifespan</u>	<u>Major Rehabilitation</u>
Local/Collector	40 years	20 years
Arterial/Heavy	30 years	15 years

Per the above table, one could assume that 1/40 of our local residential streets should be replaced and 1/20 should be rehabilitated each year.

Recommendations:

- 4.1.1. Consideration should be given to retaining an inspector to monitor the construction of streets and other town owned infrastructure. This will reduce the likelihood of sub-standard construction of infrastructure that will become the future maintenance responsibility of the Town.*
- 4.1.2. A pavement management plan that specifically identifies the level of maintenance to optimize the life of pavement should be adopted and implemented*
- 4.1.3. Streets in need of full replacement should be replaced instead of attempting to repeatedly repair the street. In order to be cost effective, the life-cycle cost of repairing vs. replacement of a street must be considered.*
- 4.1.4. To help establish a vibrant urban hometown, adopt a policy to provide 5-10% of construction costs going towards beneficial aesthetic enhancements.*
- 4.1.5. Street reconstructions should incorporate “complete streets” concepts as contained in sustainable development principle. These concepts address all potential users of the public right-of-way, and encourage the use of the right-of-way for more than vehicular transportation as was done in previous generations. Other uses to accommodate and encourage include, but are not limited to, pedestrians, runners, bicyclists, non-motorized vehicles, handicapped, children, elderly, sidewalk cafes, neighborhood interactions, community events, and extensions and entrances to off right-of-way amenities.*

4.2. Stormwater Management – The establishment of a stormwater utility is necessary to ensure the system will be maintained and repaired. An increase in the amount of

inspections has indicated a need to repair a number of aging systems in Waxhaw. Currently little time or money is allocated for stormwater management.

Recommendations:

- 4.2.1. The Town should consider stormwater utility fees to accurately reflect the cost of service and accommodate equitable system charges including credits for on-site retention and treatment.*
- 4.2.2. The Town should allocate funds for maintenance to repair the problems found with inspections.*
- 4.2.3. The Town should annually fund proposed regional stormwater detention basins to reduce flooding potential and improve regional water quality. Older detention basins should be retrofitted to hold water longer in order to settle out particulates and improve water quality exiting the basins.*

4.3. Signs and Pavement Markings – Signs and markings require constant maintenance to preserve their integrity and regulatory compliance.

Recommendations:

- 4.3.1. Pavement marking repainting needs to continue at current pace.*
- 4.3.2. A sign inspection program should be started with replacements, removals or additions where needed.*
- 4.3.3. Signs should be replaced with new and larger fonts to meet new standards for visibility.*

4.4. Trails – A number of trail projects have been proposed but funds have not been consistently allocated for the maintenance of trail projects once they are built.

Recommendations:

- 4.4.1. The Town should allocate funds for existing and expansion of the trail system and trail maintenance. This should include resurfacing of the existing trails every 20 years.*

4.5. Streetscape – Streetscape projects add a unique blend of aesthetics and landscaping to a district to attract pedestrians and businesses, though if not maintained properly it may become unsightly.

Recommendations:

- 4.5.1. The Town should allocate funds for annual maintenance as well as for rehabilitation of the existing streetscape every 15 years.*
- 4.5.2. Evaluation of planting requirements for boulevard trees within Town right-of-way impact on street and sidewalk repair costs should be undertaken.*

4.5.3. *Alternative funding (other than General Fund) should be identified for streetscape elements in business or other designated areas. Funding could include special service area.*

4.6. Vegetation in the right-of-way – There are acres of right-of-way and other Town property, excluding parks, in Waxhaw. This includes trees and open areas that need to be maintained for safety and appearance. Standards for Town properties, and recreation properties, should identify appropriate level of grass and tree maintenance required.

Recommendations:

4.6.1. *The Town should continue its commitment to designation as a “Tree Town”. Neighborhoods are the heart of a Town and trees are a key element. This should include consideration of enhanced low maintenance landscaping (parkway and boulevard trees) in high traffic public areas.*

4.6.2. *A desired standard for tree maintenance is a 7 to 8 year pace of tree maintenance with a fully-funded stump removal and tree replacement program. This includes establishing a tree inspection program to proactively identify areas that need maintenance.*

4.6.3. *The vegetation growth in right-of-ways and various Town properties present a real and immediate visual appearance and safety statement of a Town. The mowing cycle needs to be on a three to four week rotation depending on growth, with a maximum height to be determined for service level.*

4.7. Sidewalks – The quality and extent of the sidewalk system are important for the safety of the youngest and oldest of our residents. Whether it is a walk to school, neighborhood centers or other activities, residents use available sidewalk daily.

Recommendations:

4.7.1. *In a ten-year capital program the system should be upgraded to replace all substandard areas, extend to those areas that have justifiable need and bring it into full compliance with the American Disabilities Act.*

4.7.2. *Sidewalks and urbanized streets have been identified both locally and nationally as key items that help make a community livable. The Town should continue to encourage sidewalks as appropriate to connect residential, shopping centers and the urban core.*

4.8. Downtown Parking – The Town has made significant investments in downtown parking. These facilities are essential for the future growth and success of downtown. Given the current developed status of downtown it is not practical that all new development will be constructed with adequate parking. At the same time, there are

not sufficient funds available to properly operate and maintain these facilities. Transit should be a key component in development of parking and transportation plans.

Recommendations:

- 4.8.1. The Town should develop a new financial model for funding construction and maintenance of downtown parking.*
- 4.8.2. The Town should work with downtown stakeholders and develop a strategic plan for downtown parking and create a timeline to implement the plan.*

4.9. Public Facilities – Public Facilities should be practical and constructed to reduce operating and maintenance costs. At the same time Town buildings are sources of community identification and pride. These buildings should reflect the fact the “towns are forever” and accordingly incorporate high quality design and energy efficiency principles. By deferring building maintenance cost the Town has actually increased its operating cost to maintain buildings and decreased the estimated useful life of buildings. Additionally, the Town has not routinely evaluated the “life-cycle” costs of existing buildings. Consistent with this approach is the need to aggressively manage energy costs. Communities that develop and implement energy management plans have demonstrated significant savings in operating costs.

Recommendations:

- 4.9.1. Develop and implement an energy management plan to reduce energy costs for buildings, facilities, vehicles and equipment.*
- 4.9.2. Require life-cycle cost evaluation for improvement to existing buildings and for new building construction. Leadership in Energy and Environmental Design (LEED) certification should be a factor in design.*
- 4.9.3. Evaluate use of public participation mode to gain public feedback for high value public facility investment decisions.*
- 4.9.4. Prepare and maintain public facilities assessment for all public facilities. The assessment should address expected non-annual maintenance cost and facility life expectancy. An appropriate level of funding is allocated for facilities repair each fiscal year.*
- 4.9.5. Create a preventive maintenance program for all Town facilities to ensure life expectancy of buildings is achieved.*

4.10. Technology – The Town has recognized that the ever growing demands for staff services and the need for Town departments to work together require ongoing investments in computers and technology and has established a Technology department. This department should coordinate a move to a more centralized organization which will provide an opportunity and challenge to coordinate Town

technology activities and share information. Additionally, there will be more and better technology products available to towns. Residents, customers and employees will likely create pressure to invest in improved and new technology. This will require the Town to develop a disciplined approach to reviewing the requests and needs for technology investments. That approach should address cost and benefits (not limited to financial), productivity, training, support and potential obsolescence. Specific effectiveness benefits to improved technology will include improved neighborhood services once Police and Inspections functions can be coordinated and more readily accessible to Town employees. Improved efficiencies will be achieved by Police and Inspections with the ability to complete reports and access information in the field.

Recommendations:

4.10.1. Prepare and annually update technology plan with focus on improving efficiency, effectiveness and customer service.

4.10.2. Use the Information Technology internal review group to prioritize requests and needs for technology investments. This approach will address cost and benefits (not limited to financial), productivity, training, support and potential obsolescence.

4.11. Fleet Management – Waxhaw’s growth in operations will result in an increase in its vehicle inventory. Developing a centralized fleet management system will likely result in better fleet utilization and lower overall costs. Centralized fleet operation will assure that the equipment is properly maintained and available when needed, control operating and maintenance costs and independently evaluate the need for equipment purchase vs. rental. The sharing of equipment will also be enhanced with this centralization.

Recommendations:

4.11.1. Consider centralized fleet operations.

4.11.2. Utilize life cycle costing and “right-sizing” considerations when making vehicle and equipment purchases.

4.11.3. Adopt an idle-reduction policy for fleet vehicles.

4.11.4. Prioritize fleet replacements, giving priority to those units exceeding class average maintenance costs by 15% or greater.

4.11.5. Establish a goal whereby all fleet purchases will be capable of fueling with an alternative fuel and/or use advanced vehicle technologies when they demonstrate the ability to provide equal or better duty cycle performance for the same or less life-cycle cost.

4.12. Recreation Facilities – Recreation facilities are essential quality of life elements of communities that effectively compete for people to live, work and play in their Town. Failure to properly and continually invest will result in a loss in the ability to attract and

retain residents. The Town has recently completed a park and recreation master plan. However some parks and open space have been added without the benefit of understanding strategic location, provisions for operating costs, establishing a maintenance plan, accessibility or meeting community needs.

Recommendations:

4.12.1. Continue to work with community stakeholders to assess need and potential support for new recreation facilities.

4.12.2. Identify potential funding sources for new facilities including grant, partnerships and sponsorships.

4.12.3. Identify existing community facilities and sites for potential location of new community facility. Seek “impact” site that would match community recreation needs with other community goals.

4.12.4. Implement master plan for parks and recreation.

4.12.5. Identify options for multi-sport athletic fields including existing sports complex sites.

4.12.6. Develop comprehensive list of capital replacement, maintenance and new investment needs for inclusion in KFS.

4.12.7. Develop a cost-recovery policy and adjust recreation user fees to recover costs on a competitive cost model.

4.12.8. Develop partnerships for construction and operation of new facilities.

4.19. Utility Facilities – Towns need to identify, forecast and fund equipment maintenance and replacement to protect and prolong the life of those assets. Failure to recognize and follow this practice results in transferring the real cost of services from the current users to future generations and will cause one or more of the following outcomes:

- Reduced reliability and usefulness of major infrastructure systems
- Increased operating costs
- Sticker shock rate increases in future years

Waxhaw’s investment in infrastructure will be required to continue to support its projected significant development. Funding and maintaining that infrastructure will be critical to future success and affordability. Challenges will include reduction in availability of federal and state funding, aging existing infrastructure and increased federal requirements. Typically, debt service for the capital improvements, operating, maintenance and replacement costs are recovered from utility users. Developing a policy for recovery of these costs including a user fee /rate plan is essential for

successful management of utility system. A disciplined decision process is needed to prioritize capital investments and provide the revenue for these improvements

Recommendations:

- 4.19.1. Use of defined decision-making process for high value Utility facility investment decisions.***
- 4.19.2. Evaluate use of public participation mode to gain public feedback for high value Utility facility investment decisions.***
- 4.19.3. Develop a long-term rate strategy tied to projected improvements***
- 4.19.4. Evaluate use of non- GO revenue bonds supported by a “Utilities” debt reserve fund to reduce debt service costs.***
- 4.19.5. Evaluate development of rate structure to support pay-as-you go financing of some capital improvements.***
- 4.19.6. Utility rates should be reviewed for annual adjustments to reflect changes in cost of services.***
- 4.19.7. Evaluate use of public participation mode to gain public feedback for high value utility facility investment decisions.***

IMPLEMENTATION

KFS is a policy implementation plan that permits towns to combine long-term strategic planning with sound financial management practices. The results of the financial planning are used to guide the annual budget preparation process. In order to effectively use KFS the following process is recommended:

1. The Town’s Vision statement should guide the development of annual Town goal setting. These goals should be limited to a manageable number needed to advance the Town’s progress to realize the Town Vision.
2. Town staff updates and refines the five-year budget projection. The update should reflect the financial and performance result of annual operations.
3. Town staff updates KFS issues and Action Plan (reflecting actual results of accomplishments and new issues) prior to annual budget planning.
4. Town Board reviews KFS updates as part of (or prior to) annual goal setting/strategic planning.
5. Results from annual goals incorporated into updated KFS.
6. Updated KFS used to guide preparation of annual budget and preparation of Board work plan (scheduled meetings).
7. Summary of KFS results provided to Boards and Commissions and general public.

Short-Term Focus

Focusing energy on a few recommendations identified above will be beneficial for the Town. This will ensure adequate resources (staff and funding) are available to successfully accomplish implementation strategies and meet expected outcomes. From discussions with Town staff and Town Commissioners, these are the recommendations to focus on in the short-term (1-2 years).

1. Establish and fund operating systems for core services essential to Town operations and growth management.
2. Diversify the tax base. Resources should be directed towards economic development activities that will attract new business and commercial properties.
3. Develop a strategic plan that identifies the Town’s Vision and establishes goals and metrics.
4. Develop an operating performance framework to measure other metrics beside financial. Examples include a Balanced Scorecard, Key Performance Indicators (KPI).

5. Implement systems and software such as a pavement management system and fleet management system to effectively prolong life and reduce operating costs of major infrastructure systems.

Town Summary

	Fiscal Year 2014/2015	Projected Fiscal Year 2015/2016	Projected Fiscal Year 2016/2017	Projected Fiscal Year 2017/2018	Projected Fiscal Year 2018/2019	Projected Fiscal Year 2019/2020	Projected Fiscal Year 2020/2021	Projected Fiscal Year 2021/2022	Projected Fiscal Year 2022/2023	Projected Fiscal Year 2023/2024	Projected Fiscal Year 2024/2025
1 GENERAL GOVERNMENT											
2 <i>REVENUE (categories defined by town)</i>											
3 GENERAL PROPERTY TAX	\$ 5,308,852.41	\$ 5,523,794.04	\$ 5,882,320.65	\$ 6,264,151.49	\$ 6,670,801.34	\$ 7,103,883.43	\$ 7,565,115.85	\$ 8,056,328.38	\$ 8,579,469.73	\$ 9,136,615.26	\$ 9,729,975.25
4 LICENSES & PERMITS	\$ 930,800.00	\$ 408,920.00	\$ 412,170.00	\$ 415,487.50	\$ 418,874.53	\$ 422,333.16	\$ 425,865.56	\$ 429,473.92	\$ 433,160.54	\$ 436,927.76	\$ 440,777.99
5 SALES & SERVICES	\$ 502,536.00	\$ 467,957.52	\$ 493,847.51	\$ 521,376.54	\$ 550,650.09	\$ 581,780.47	\$ 614,887.25	\$ 650,097.76	\$ 687,547.57	\$ 727,381.04	\$ 769,751.86
6 LOCAL GOVERNMENT AID	\$ 295,000.00	\$ 307,261.50	\$ 322,624.58	\$ 338,755.80	\$ 355,693.59	\$ 373,478.27	\$ 392,152.19	\$ 411,759.80	\$ 432,347.79	\$ 453,965.18	\$ 476,663.43
7 OTHER INTERGOVERNMENTAL	\$ 1,777,530.00	\$ 2,037,100.00	\$ 2,051,674.00	\$ 2,066,393.74	\$ 2,081,260.68	\$ 2,096,276.28	\$ 2,111,442.05	\$ 2,126,759.47	\$ 2,142,230.06	\$ 2,157,855.36	\$ 2,173,636.92
8 DONATIONS & SPONSORSHIPS	\$ 25,500.00	\$ 28,500.00	\$ 28,500.00	\$ 31,000.00	\$ 33,500.00	\$ 36,000.00	\$ 38,500.00	\$ 43,500.00	\$ 48,500.00	\$ 53,500.00	\$ 58,500.00
9 MISC REVENUE	\$ 7,130.00	\$ 7,300.00	\$ 7,330.00	\$ 7,360.90	\$ 7,392.73	\$ 7,425.51	\$ 7,459.27	\$ 7,494.05	\$ 7,529.87	\$ 7,566.77	\$ 7,604.77
10 TOTAL REVENUES	\$ 8,847,348.41	\$ 8,780,833.06	\$ 9,198,466.73	\$ 9,644,525.98	\$ 10,118,172.96	\$ 10,621,177.13	\$ 11,155,422.17	\$ 11,725,413.38	\$ 12,330,785.56	\$ 12,973,811.36	\$ 13,656,910.23
11 <i>EXPENSES (categories defined by town)</i>											
12 ADMINISTRATION	\$ 1,409,631.00	\$ 1,966,366.16	\$ 2,104,180.70	\$ 2,268,032.08	\$ 2,310,207.50	\$ 2,399,831.04	\$ 2,519,120.51	\$ 2,630,754.97	\$ 2,826,705.21	\$ 2,968,984.74	\$ 3,109,505.86
13 BUILDING INSPECTIONS	\$ 515,300.00	\$ 542,194.92	\$ 616,707.61	\$ 645,415.12	\$ 677,233.33	\$ 712,707.02	\$ 808,608.87	\$ 855,153.19	\$ 907,766.57	\$ 967,567.06	\$ 1,035,893.41
14 EVENTS	\$ 205,090.00	\$ 268,775.00	\$ 284,835.00	\$ 307,545.00	\$ 331,355.00	\$ 345,465.00	\$ 356,575.00	\$ 367,685.00	\$ 380,795.00	\$ 404,905.00	\$ 423,015.00
15 HUMAN RESOURCES	\$ 88,447.00	\$ 171,445.46	\$ 131,696.26	\$ 182,305.25	\$ 191,639.87	\$ 197,191.83	\$ 208,647.23	\$ 216,072.12	\$ 229,180.40	\$ 239,497.47	\$ 255,841.12
16 PARKS & RECREATION	\$ 154,527.00	\$ 234,621.59	\$ 321,678.68	\$ 452,380.31	\$ 697,504.28	\$ 679,295.34	\$ 1,101,608.85	\$ 760,568.36	\$ 1,172,364.26	\$ 806,768.90	\$ 838,787.00
17 PLANNING & COMMUNITY DEVELOPMENT	\$ 1,014,388.00	\$ 812,558.12	\$ 1,002,773.58	\$ 1,244,317.94	\$ 1,252,484.47	\$ 1,306,343.92	\$ 1,378,441.95	\$ 1,568,263.74	\$ 1,656,925.22	\$ 1,697,527.67	\$ 1,810,217.02
18 POLICE	\$ 2,001,004.00	\$ 2,227,039.82	\$ 2,497,593.69	\$ 2,735,609.76	\$ 3,056,788.12	\$ 3,269,396.27	\$ 3,506,391.18	\$ 3,761,238.54	\$ 4,044,080.68	\$ 4,360,863.86	\$ 4,715,508.23
19 PUBLIC SERVICES	\$ 2,366,278.00	\$ 3,398,299.42	\$ 2,671,625.04	\$ 2,874,145.15	\$ 3,098,334.59	\$ 3,519,622.64	\$ 3,640,119.82	\$ 3,911,981.42	\$ 4,440,274.45	\$ 4,764,586.59	\$ 5,139,618.87
20 TECHNOLOGY	\$ 5,000.00	\$ 124,900.00	\$ 62,800.00	\$ 176,300.00	\$ 194,500.00	\$ 193,900.00	\$ 170,200.00	\$ 197,500.00	\$ 213,900.00	\$ 326,800.00	\$ 253,800.00
21 DEBT SERVICE	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00	\$ 526,564.00
22 TOTAL EXPENSES	\$ 8,286,229.00	\$ 10,272,764.49	\$ 10,220,454.56	\$ 11,412,614.61	\$ 12,336,611.15	\$ 13,150,317.07	\$ 14,216,277.40	\$ 14,795,781.34	\$ 16,398,555.79	\$ 17,064,065.28	\$ 18,108,750.51
23											
24 REVENUE OVER (UNDER) EXPENSES	\$ 561,119.41	\$ (1,491,931.43)	\$ (1,021,987.83)	\$ (1,768,088.63)	\$ (2,218,438.19)	\$ (2,529,139.94)	\$ (3,060,855.23)	\$ (3,070,367.96)	\$ (4,067,770.23)	\$ (4,090,253.92)	\$ (4,451,840.28)
25											
26 PROPERTY TAX RATE	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34
27 PROPERTY TAX RATE NEEDED		\$ 0.43	\$ 0.40	\$ 0.44	\$ 0.45	\$ 0.46	\$ 0.48	\$ 0.47	\$ 0.50	\$ 0.49	\$ 0.50
28 INCREASE TAX LEVY NEEDED		\$ 0.09	\$ 0.06	\$ 0.10	\$ 0.11	\$ 0.12	\$ 0.14	\$ 0.13	\$ 0.16	\$ 0.15	\$ 0.16
29											
30 CAPITAL PROJECTS											
31 <i>CAPITAL PROJECTS REQUESTED</i>	\$ 1,612,200.00	\$ 8,760,500.00	\$ 9,464,650.00	\$ 25,790,255.00	\$ 5,508,630.00	\$ 25,037,050.00	\$ 9,625,825.00	\$ 4,979,600.00	\$ 9,985,375.00	\$ 6,369,500.00	\$ 8,595,650.00
32 <i>TRANSFER IN</i>											
33 GRANTS	\$ -	\$ 99,500.00	\$ 484,115.00	\$ 1,983,525.50	\$ 458,013.00	\$ 675,605.00	\$ 920,482.50	\$ 443,460.00	\$ 885,937.50	\$ 603,950.00	\$ 812,565.00
34 OTHER REVENUE SOURCES	\$ -	\$ 413,000.00	\$ -	\$ 1,600,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 DEBT FUNDED	\$ -	\$ 3,500,000.00	\$ 4,000,000.00	\$ 13,100,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 <i>TRANSFER OUT</i>											
37 GENERAL FUND	\$ 1,612,200.00	\$ 4,748,000.00	\$ 4,980,535.00	\$ 9,106,729.50	\$ 5,050,617.00	\$ 24,361,445.00	\$ 8,705,342.50	\$ 4,536,140.00	\$ 9,099,437.50	\$ 5,765,550.00	\$ 7,783,085.00
38 DEBT SERVICE FOR CAPITAL PROJECTS	\$ -	\$ 307,194.13	\$ 658,273.14	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88	\$ 1,808,056.88
39											
40 CP TRANSFER OUT	\$ 1,612,200.00	\$ 5,055,194.13	\$ 5,638,808.14	\$ 10,914,786.38	\$ 6,858,673.88	\$ 26,169,501.88	\$ 10,513,399.38	\$ 6,344,196.88	\$ 10,907,494.38	\$ 7,573,606.88	\$ 9,591,141.88
41											
42 General Fund balance, beginning	\$ 7,115,841.00	\$ 6,064,760.41	\$ (482,365.15)	\$ (7,143,161.11)	\$ (19,826,036.12)	\$ (28,903,148.19)	\$ (57,601,790.01)	\$ (71,176,044.62)	\$ (80,590,609.46)	\$ (95,565,874.07)	\$ (107,229,734.86)
43 General Fund balance, ending	\$ 6,064,760.41	\$ (482,365.15)	\$ (7,143,161.11)	\$ (19,826,036.12)	\$ (28,903,148.19)	\$ (57,601,790.01)	\$ (71,176,044.62)	\$ (80,590,609.46)	\$ (95,565,874.07)	\$ (107,229,734.86)	\$ (121,272,717.03)

Capital Project Requests by Department

	FY											
CAPITAL PROJECTS	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	FY 24/25	
1 ADMINISTRATION												
2 WAYFINDING SIGNAGE (STMS)	\$ 86,700.00	\$ 89,000.00	\$ 96,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
3 TOWN HALL DEVELOPMENT	\$ 100,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
4 TOWN FACILITIES	\$ -	\$ -	\$ -	\$ 10,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
5 VEHICLE PURCHASE FOR EVENTS (TRUCK)	\$ -	\$ 35,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
6 FINANCIAL SOFTWARE (ADMIN)	\$ -	\$ -	\$ 69,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
7 DOWNTOWN STREETLIGHT UPGRADES (80 LIGHTS)	\$ -	\$ 130,000.00	\$ 150,000.00	\$ 130,000.00	\$ 130,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
8 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
9 CP TOTAL	\$ 186,700.00	\$ 254,000.00	\$ 315,000.00	\$ 10,130,000.00	\$ 130,000.00	\$ -						
11 BUILDING INSPECTIONS												
12 VEHICLE PURCHASE (BUILDING INSPECTIONS)	\$ 35,000.00	\$ -	\$ 36,000.00	\$ -	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00	\$ -	\$ 36,000.00	\$ -	\$ -	
13 CP TOTAL	\$ 35,000.00	\$ -	\$ 36,000.00	\$ -	\$ 36,000.00	\$ 36,000.00	\$ 36,000.00	\$ -	\$ 36,000.00	\$ -	\$ -	
15 PARKS & RECREATION												
16 VEHICLE ACQUISITION/UPDATE (P&R)	\$ -	\$ 35,000.00	\$ -	\$ -	\$ 35,000.00	\$ -	\$ 35,000.00	\$ -	\$ -	\$ -	\$ -	
17 PARK LAND ACQUISITION	\$ -	\$ 300,000.00	\$ 350,000.00	\$ -	\$ 100,000.00	\$ -	\$ 350,000.00	\$ -	\$ -	\$ -	\$ -	
18 CENTRAL DOWNTOWN PARK PLANNING & DESIGN	\$ -	\$ 278,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
19 CENTRAL DOWNTOWN COMMUNITY PARK	\$ -	\$ -	\$ -	\$ 4,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
20 GREENWAY CONSTRUCTION	\$ -	\$ -	\$ 50,000.00	\$ -	\$ -	\$ 1,250,000.00	\$ -	\$ -	\$ -	\$ 1,250,000.00	\$ -	
21 GREENWAY EASEMENTS	\$ -	\$ 10,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
22 NEIGHBORHOOD PARK PLANNING & DESIGN	\$ -	\$ -	\$ -	\$ -	\$ 50,000.00	\$ -	\$ 300,000.00	\$ -	\$ -	\$ -	\$ -	
23 DOG PARK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 200,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	
24 COMMUNITY PARK 1 PLANNING & DESIGN	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,000.00	\$ -	\$ -	\$ -	
25 COMMUNITY PARK 1	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,750,000.00	\$ -	\$ 3,750,000.00	
26 NEIGHBORHOOD PARKS	\$ -	\$ 300,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 750,000.00	\$ -	\$ -	
27 34 ACRE PARK PLANNING & DESIGN	\$ -	\$ -	\$ -	\$ -	\$ 400,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
28 34 ACRE PARK	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,500,000.00	\$ -	\$ -	\$ -	\$ -	
29 TOWN CREEK PARK EXPANSION-IMPROVEMENT	\$ -	\$ 75,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
30 MALL AREA	\$ -	\$ -	\$ 4,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
31 McDONALD HOUSE	\$ -	\$ 80,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
32 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION (TRAILS & GREENWAYS)	\$ -	\$ -	\$ 1,669,600.00	\$ 4,360,950.00	\$ 2,280,750.00	\$ 3,027,750.00	\$ 2,897,700.00	\$ 1,884,600.00	\$ 2,624,850.00	\$ 3,022,800.00	\$ 1,956,750.00	
33 YMCA	\$ 1,200,000.00	\$ 350,000.00	\$ 350,000.00	\$ 350,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
34 CP TOTAL	\$ 1,200,000.00	\$ 1,428,000.00	\$ 6,419,600.00	\$ 8,710,950.00	\$ 2,865,750.00	\$ 4,477,750.00	\$ 7,082,700.00	\$ 2,034,600.00	\$ 7,124,850.00	\$ 4,272,800.00	\$ 5,706,750.00	
36 PLANNING & COMMUNITY DEVELOPMENT												
37 VEHICLE PURCHASE (PLANNING)	\$ -	\$ -	\$ -	\$ 40,000.00	\$ -	\$ -	\$ 45,000.00	\$ -	\$ -	\$ -	\$ 45,000.00	
38 DOWNTOWN INFRASTRUCTURE	\$ -	\$ -	\$ -	\$ 4,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
39 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
40 CP TOTAL	\$ -	\$ -	\$ -	\$ 4,040,000.00	\$ -	\$ -	\$ 45,000.00	\$ -	\$ -	\$ -	\$ 45,000.00	
42 POLICE												
43 POLICE VEHICLES- 1 (new police officers);Turnover of old to new vehicles 5 per year including upfit \$40,000 per vehicle	\$ 110,000.00	\$ 320,000.00	\$ 280,000.00	\$ 240,000.00	\$ 320,000.00	\$ 240,000.00	\$ 240,000.00	\$ 240,000.00	\$ 240,000.00	\$ 240,000.00	\$ 240,000.00	
44 ANIMAL CONTROL TRUCK	\$ -	\$ -	\$ -	\$ 45,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
45 30 POLICE BODY CAMERAS	\$ -	\$ -	\$ 45,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
46 2 K9	\$ -	\$ -	\$ -	\$ 30,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
47 20 TASERS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	
48 CAR RADIOS	\$ -	\$ -	\$ 14,000.00	\$ 7,000.00	\$ 14,000.00	\$ 42,000.00	\$ 42,000.00	\$ 42,000.00	\$ 42,000.00	\$ 42,000.00	\$ 42,000.00	
49 IN-CAR CAMERAS	\$ -	\$ 38,500.00	\$ 38,500.00	\$ 33,000.00	\$ 38,500.00	\$ 33,000.00	\$ 33,000.00	\$ 33,000.00	\$ 33,000.00	\$ 33,000.00	\$ 33,000.00	
50 POLICE BUILDING EXPANSION-Expansion of building into unused space; additional upfits a	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100,000.00	
51 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
52 CP TOTAL	\$ 110,000.00	\$ 358,500.00	\$ 377,500.00	\$ 355,000.00	\$ 372,500.00	\$ 355,000.00	\$ 315,000.00	\$ 315,000.00	\$ 315,000.00	\$ 315,000.00	\$ 415,000.00	

	<u>FY 14/15</u>	<u>FY 15/16</u>	<u>FY 16/17</u>	<u>FY 17/18</u>	<u>FY 18/19</u>	<u>FY 19/20</u>	<u>FY 20/21</u>	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	<u>FY 24/25</u>
CAPITAL PROJECTS											
54 PUBLIC SERVICE											
55 EQUIPMENT PURCHASE (PUBLIC SERVICES)	\$ 25,500.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
56 PUMP TRUCK/ASPHALT ROLLER	\$ -	\$ 45,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
57 1 ARM BANDIT	\$ -	\$ -	\$ 150,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
58 1 ARM BANDIT	\$ -	\$ -	\$ -	\$ 160,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
59 2 PICKUPS (PUBLIC SERVICE)	\$ -	\$ -	\$ -	\$ -	\$ 90,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
60 SKIDSTEER	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 135,000.00	\$ -	\$ -	\$ -	\$ -	\$ -
61 PICKUP (PUBLIC SERVICE)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35,000.00	\$ -	\$ -	\$ -	\$ -
62 SWEEPER	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100,000.00	\$ -	\$ -	\$ -
63 VEHICLE (PUBLIC SERVICE)	\$ -	\$ -	\$ 30,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
64 VEHICLE (PUBLIC SERVICE)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,000.00	\$ -	\$ -
65 VEHICLE (PUBLIC SERVICE)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 35,000.00	\$ -
66 VEHICLE (PUBLIC SERVICE)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,000.00
67 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION (SIDEWALKS)	\$ -	\$ -	\$ 1,786,050.00	\$ 1,949,805.00	\$ 1,564,380.00	\$ 1,590,300.00	\$ 1,603,125.00	\$ 2,038,500.00	\$ 1,838,025.00	\$ 1,244,700.00	\$ 1,989,900.00
68 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION (CROSSWALKS)	\$ -	\$ -	\$ 150,500.00	\$ 194,500.00	\$ 200,000.00	\$ 158,000.00	\$ 224,000.00	\$ 181,500.00	\$ 316,500.00	\$ 192,000.00	\$ 99,000.00
69 STREET INSTALL & REPLACEMENT-TOWN	\$ 30,000.00	\$ 100,000.00	\$ 150,000.00	\$ 200,000.00	\$ 200,000.00	\$ 225,000.00	\$ 225,000.00	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00	\$ 250,000.00
70 STREET INSTALL & REPLACEMENT-POWELL	\$ 25,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 60,000.00	\$ 60,000.00	\$ 60,000.00	\$ 60,000.00	\$ 60,000.00	\$ 60,000.00
71 NEW PUBLIC SERVICES FACILITY	\$ -	\$ 3,500,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
72 FLEET MANAGEMENT SYSTEM	\$ -	\$ 25,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
73 KENSINGTON DRIVE	\$ -	\$ 3,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
74 0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
75 CP TOTAL	\$ 80,500.00	\$ 6,720,000.00	\$ 2,316,550.00	\$ 2,554,305.00	\$ 2,104,380.00	\$ 2,168,300.00	\$ 2,147,125.00	\$ 2,630,000.00	\$ 2,509,525.00	\$ 1,781,700.00	\$ 2,428,900.00
76											
77 UNASSIGNED											
78											
79 QUIET CROSSINGS						\$ 4,000,000.00					
80 INFRASTRUCTURE						\$ 4,000,000.00					
81 MASTER PLANS						\$ 10,000,000.00					
82 32 ACRES DONATION (ANTICIPATE TO BE PARK)											
83											
84 UNASSIGNED TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -
85											
86 TOTAL CP REQUESTS	\$ 1,612,200.00	\$ 8,760,500.00	\$ 9,464,650.00	\$ 25,790,255.00	\$ 5,508,630.00	\$ 25,037,050.00	\$ 9,625,825.00	\$ 4,979,600.00	\$ 9,985,375.00	\$ 6,369,500.00	\$ 8,595,650.00

Financial Plan
Town of Waxhaw
Revised 3/11/2015

CAPITAL PROJECTS FINANCE MIX

Project Description	FY START	Cost est	Project Funding Strategy				DEBT SERVICE ESTIMATE						
			Town Funds	Grant	Other Sources	Loan Amount	APR	Term in Years	Number of PMTs per Yr	Payment	Yearly PMTs	Total Interest	DEBT SERVICE- Total Payments
1 WAYFINDING SIGNAGE (STMS)	FY 14/15	\$ 86,700.00	\$ 86,700.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
2 TOWN HALL DEVELOPMENT	FY 14/15	\$ 100,000.00	\$ 100,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
3 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 14/15	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
4 YMCA	FY 14/15	\$ 1,200,000.00	\$ 1,200,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
5 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 14/15	\$ 110,000.00	\$ 110,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
6 EQUIPMENT PURCHASE (PUBLIC SERVICES)	FY 14/15	\$ 25,500.00	\$ 25,500.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
7 STREET INSTALL & REPLACEMENT-TOWN	FY 14/15	\$ 30,000.00	\$ 30,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
8 STREET INSTALL & REPLACEMENT-POWELL	FY 14/15	\$ 25,000.00	\$ 25,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
9 WAYFINDING SIGNAGE (STMS)	FY 15/16	\$ 89,000.00	\$ 89,000.00			\$ -	0.00%	1	1				
10 VEHICLE PURCHASE FOR EVENTS (TRUCK)	FY 15/16	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
11 DOWNTOWN STREETLIGHT UPGRADES (80 LIGHTS)	FY 15/16	\$ 130,000.00	\$ 117,000.00		\$ 13,000.00	\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
12 VEHICLE ACQUISITION/UPDATE (P&R)	FY 15/16	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
13 PARK LAND ACQUISITION	FY 15/16	\$ 300,000.00	\$ 270,000.00	\$ 30,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
14 CENTRAL DOWNTOWN PARK PLANNING & DESIGN	FY 15/16	\$ 278,000.00	\$ 278,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
15 GREENWAY EASEMENTS	FY 15/16	\$ 10,000.00	\$ 9,000.00	\$ 1,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
16 NEIGHBORHOOD PARKS	FY 15/16	\$ 300,000.00	\$ 270,000.00	\$ 30,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
17 TOWN CREEK PARK EXPANSION-IMPROVEMENT	FY 15/16	\$ 75,000.00	\$ 75,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
18 McDONALD HOUSE	FY 15/16	\$ 80,000.00	\$ 80,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
19 YMCA	FY 15/16	\$ 350,000.00	\$ 350,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
20 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 15/16	\$ 320,000.00	\$ 320,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
21 IN-CAR CAMERAS	FY 15/16	\$ 38,500.00		\$ 38,500.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
22 PUMP TRUCK/ASPHALT ROLLER	FY 15/16	\$ 45,000.00	\$ 45,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
23 STREET INSTALL & REPLACEMENT-TOWN	FY 15/16	\$ 100,000.00	\$ 100,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
24 STREET INSTALL & REPLACEMENT-POWELL	FY 15/16	\$ 50,000.00	\$ 50,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
25 NEW PUBLIC SERVICES FACILITY	FY 15/16	\$ 3,500,000.00				\$ 3,500,000.00	3.80%	15	4	\$76,798.53	\$ 307,194.13	\$ 1,107,911.95	\$ 4,607,911.95
26 FLEET MANAGEMENT SYSTEM	FY 15/16	\$ 25,000.00	\$ 25,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
27 KENSINGTON DRIVE	FY 15/16	\$ 3,000,000.00	\$ 2,600,000.00		\$ 400,000.00	\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
28 WAYFINDING SIGNAGE (STMS)	FY 16/17	\$ 96,000.00	\$ 96,000.00			\$ -	0.00%	1	1				
29 FINANCIAL SOFTWARE (ADMIN)	FY 16/17	\$ 69,000.00	\$ 69,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
30 DOWNTOWN STREETLIGHT UPGRADES (80 LIGHTS)	FY 16/17	\$ 150,000.00	\$ 150,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
31 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 16/17	\$ 36,000.00	\$ 36,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
32 PARK LAND ACQUISITION	FY 16/17	\$ 350,000.00	\$ 315,000.00	\$ 35,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
33 GREENWAY CONSTRUCTION	FY 16/17	\$ 50,000.00	\$ 45,000.00	\$ 5,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
34 MALL AREA	FY 16/17	\$ 4,000,000.00				\$ 4,000,000.00	3.80%	15	4	\$87,769.75	\$ 351,079.01	\$ 1,266,185.08	\$ 5,266,185.08
35 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 16/17	\$ 1,669,600.00	\$ 1,502,640.00	\$ 166,960.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
36 YMCA	FY 16/17	\$ 350,000.00	\$ 350,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
37 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 16/17	\$ 280,000.00	\$ 280,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
38 30 POLICE BODY CAMERAS	FY 16/17	\$ 45,000.00		\$ 45,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
39 CAR RADIOS	FY 16/17	\$ 14,000.00	\$ 14,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
40 IN-CAR CAMERAS	FY 16/17	\$ 38,500.00		\$ 38,500.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
41 1 ARM BANDIT	FY 16/17	\$ 150,000.00	\$ 150,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
42 VEHICLE (PUBLIC SERVICE)	FY 16/17	\$ 30,000.00	\$ 30,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
43 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 16/17	\$ 1,786,050.00	\$ 1,607,445.00	\$ 178,605.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
44 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 16/17	\$ 150,500.00	\$ 135,450.00	\$ 15,050.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
45 STREET INSTALL & REPLACEMENT-TOWN	FY 16/17	\$ 150,000.00	\$ 150,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
46 STREET INSTALL & REPLACEMENT-POWELL	FY 16/17	\$ 50,000.00	\$ 50,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -

Project Description	FY START	Cost est	Project Funding Strategy				DEBT SERVICE ESTIMATE						
			Town Funds	Grant	Other Sources	Loan Amount	APR	Number		Payment	Yearly PMTs	Total Interest	DEBT SERVICE- Total Payments
								Term in Years	of PMTs per Yr				
47 TOWN FACILITIES	FY 17/18	\$ 10,000,000.00				\$ 10,000,000.00	3.80%	15	4	\$219,424.38	\$ 877,697.51	\$ 3,165,462.71	\$ 13,165,462.71
48 DOWNTOWN STREETLIGHT UPGRADES (80 LIGHTS)	FY 17/18	\$ 130,000.00	\$ 130,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
49 CENTRAL DOWNTOWN COMMUNITY PARK	FY 17/18	\$ 4,000,000.00	\$ 2,000,000.00	\$ 500,000.00		\$ 1,500,000.00	3.80%	15	4	\$32,913.66	\$ 131,654.63	\$ 474,819.41	\$ 1,974,819.41
50 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 17/18	\$ 4,360,950.00	\$ 3,924,855.00	\$ 436,095.00		\$ -		1	1	\$0.00	\$ -	#NUM!	\$ -
51 YMCA	FY 17/18	\$ 350,000.00	\$ 350,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
52 VEHICLE PURCHASE (PLANNING)	FY 17/18	\$ 40,000.00	\$ 40,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
53 DOWNTOWN INFRASTRUCTURE	FY 17/18	\$ 4,000,000.00		\$ 800,000.00	\$ 1,600,000.00	\$ 1,600,000.00	3.80%	15	4	\$35,107.90	\$ 140,431.60	\$ 506,474.03	\$ 2,106,474.03
54 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 17/18	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
55 ANIMAL CONTROL TRUCK	FY 17/18	\$ 45,000.00	\$ 45,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
56 2 K9	FY 17/18	\$ 30,000.00	\$ 30,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
57 CAR RADIOS	FY 17/18	\$ 7,000.00	\$ 7,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
58 IN-CAR CAMERAS	FY 17/18	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
59 1 ARM BANDIT	FY 17/18	\$ 160,000.00	\$ 160,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
60 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 17/18	\$ 1,949,805.00	\$ 1,754,824.50	\$ 194,980.50		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
61 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 17/18	\$ 194,500.00	\$ 175,050.00	\$ 19,450.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
62 STREET INSTALL & REPLACEMENT-TOWN	FY 17/18	\$ 200,000.00	\$ 200,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
63 STREET INSTALL & REPLACEMENT-POWELL	FY 17/18	\$ 50,000.00	\$ 50,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
64 DOWNTOWN STREETLIGHT UPGRADES (80 LIGHTS)	FY 18/19	\$ 130,000.00	\$ 130,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
65 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 18/19	\$ 36,000.00	\$ 36,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
66 VEHICLE ACQUISITION/UPDATE (P&R)	FY 18/19	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
67 PARK LAND ACQUISITION	FY 18/19	\$ 100,000.00	\$ 90,000.00	\$ 10,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
68 NEIGHBORHOOD PARK PLANNING & DESIGN	FY 18/19	\$ 50,000.00	\$ 45,000.00	\$ 5,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
69 34 ACRE PARK PLANNING & DESIGN	FY 18/19	\$ 400,000.00	\$ 400,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
70 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 18/19	\$ 2,280,750.00	\$ 2,052,675.00	\$ 228,075.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
71 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 18/19	\$ 320,000.00	\$ 320,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
72 CAR RADIOS	FY 18/19	\$ 14,000.00	\$ 14,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
73 IN-CAR CAMERAS	FY 18/19	\$ 38,500.00		\$ 38,500.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
74 2 PICKUPS (PUBLIC SERVICE)	FY 18/19	\$ 90,000.00	\$ 90,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
75 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 18/19	\$ 1,564,380.00	\$ 1,407,942.00	\$ 156,438.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
76 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 18/19	\$ 200,000.00	\$ 180,000.00	\$ 20,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
77 STREET INSTALL & REPLACEMENT-TOWN	FY 18/19	\$ 200,000.00	\$ 200,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
78 STREET INSTALL & REPLACEMENT-POWELL	FY 18/19	\$ 50,000.00	\$ 50,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
79 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 19/20	\$ 36,000.00	\$ 36,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
80 GREENWAY CONSTRUCTION	FY 19/20	\$ 1,250,000.00	\$ 1,125,000.00	\$ 125,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
81 DOG PARK	FY 19/20	\$ 200,000.00	\$ 200,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
82 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 19/20	\$ 3,027,750.00	\$ 2,724,975.00	\$ 302,775.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
83 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 19/20	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
84 20 TASERS	FY 19/20	\$ 40,000.00		\$ 40,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
85 CAR RADIOS	FY 19/20	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
86 IN-CAR CAMERAS	FY 19/20	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
87 SKIDSTEER	FY 19/20	\$ 135,000.00	\$ 135,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
88 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 19/20	\$ 1,590,300.00	\$ 1,431,270.00	\$ 159,030.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
89 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 19/20	\$ 158,000.00	\$ 142,200.00	\$ 15,800.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
90 STREET INSTALL & REPLACEMENT-TOWN	FY 19/20	\$ 225,000.00	\$ 225,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
91 STREET INSTALL & REPLACEMENT-POWELL	FY 19/20	\$ 60,000.00	\$ 60,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
92 QUIET CROSSINGS	FY 19/20	\$ 4,000,000.00	\$ 4,000,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
93 INFRASTRUCTURE	FY 19/20	\$ 4,000,000.00	\$ 4,000,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
94 MASTER PLANS	FY 19/20	\$ 10,000,000.00	\$ 10,000,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
95 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 20/21	\$ 36,000.00	\$ 36,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
96 VEHICLE ACQUISITION/UPDATE (P&R)	FY 20/21	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
97 PARK LAND ACQUISITION	FY 20/21	\$ 350,000.00	\$ 315,000.00	\$ 35,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -

Project Description	FY START	Cost est	Project Funding Strategy				DEBT SERVICE ESTIMATE						
			Town Funds	Grant	Other Sources	Loan Amount	APR	Term in	Number	Payment	Yearly PMTs	Total Interest	DEBT SERVICE-
								Years	of PMTs				Total Payments
98 NEIGHBORHOOD PARK PLANNING & DESIGN	FY 20/21	\$ 300,000.00	\$ 270,000.00	\$ 30,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
99 34 ACRE PARK	FY 20/21	\$ 3,500,000.00	\$ 3,150,000.00	\$ 350,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
100 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 20/21	\$ 2,897,700.00	\$ 2,607,930.00	\$ 289,770.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
101 VEHICLE PURCHASE (PLANNING)	FY 20/21	\$ 45,000.00	\$ 45,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
102 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 20/21	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
103 CAR RADIOS	FY 20/21	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
104 IN-CAR CAMERAS	FY 20/21	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
105 PICKUP (PUBLIC SERVICE)	FY 20/21	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
106 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 20/21	\$ 1,603,125.00	\$ 1,442,812.50	\$ 160,312.50		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
107 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 20/21	\$ 224,000.00	\$ 201,600.00	\$ 22,400.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
108 STREET INSTALL & REPLACEMENT-TOWN	FY 20/21	\$ 225,000.00	\$ 225,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
109 STREET INSTALL & REPLACEMENT-POWELL	FY 20/21	\$ 60,000.00	\$ 60,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
110 COMMUNITY PARK 1 PLANNING & DESIGN	FY 21/22	\$ 150,000.00	\$ 150,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
111 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 21/22	\$ 1,884,600.00	\$ 1,696,140.00	\$ 188,460.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
112 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 21/22	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
113 CAR RADIOS	FY 21/22	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
114 IN-CAR CAMERAS	FY 21/22	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
115 SWEEPER	FY 21/22	\$ 100,000.00	\$ 100,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
116 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 21/22	\$ 2,038,500.00	\$ 1,834,650.00	\$ 203,850.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
117 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 21/22	\$ 181,500.00	\$ 163,350.00	\$ 18,150.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
118 STREET INSTALL & REPLACEMENT-TOWN	FY 21/22	\$ 250,000.00	\$ 250,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
119 STREET INSTALL & REPLACEMENT-POWELL	FY 21/22	\$ 60,000.00	\$ 60,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
120 VEHICLE PURCHASE (BUILDING INSPECTIONS)	FY 22/23	\$ 36,000.00	\$ 36,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
121 COMMUNITY PARK 1	FY 22/23	\$ 3,750,000.00	\$ 3,375,000.00	\$ 375,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
122 NEIGHBORHOOD PARKS	FY 22/23	\$ 750,000.00	\$ 750,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
123 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 22/23	\$ 2,624,850.00	\$ 2,362,365.00	\$ 262,485.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
124 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 22/23	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
125 CAR RADIOS	FY 22/23	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
126 IN-CAR CAMERAS	FY 22/23	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
127 VEHICLE (PUBLIC SERVICE)	FY 22/23	\$ 45,000.00	\$ 45,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
128 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 22/23	\$ 1,838,025.00	\$ 1,654,222.50	\$ 183,802.50		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
129 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 22/23	\$ 316,500.00	\$ 284,850.00	\$ 31,650.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
130 STREET INSTALL & REPLACEMENT-TOWN	FY 22/23	\$ 250,000.00	\$ 250,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
131 STREET INSTALL & REPLACEMENT-POWELL	FY 22/23	\$ 60,000.00	\$ 60,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
132 GREENWAY CONSTRUCTION	FY 23/24	\$ 1,250,000.00	\$ 1,125,000.00	\$ 125,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
133 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 23/24	\$ 3,022,800.00	\$ 2,720,520.00	\$ 302,280.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
134 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 23/24	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
135 CAR RADIOS	FY 23/24	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
136 IN-CAR CAMERAS	FY 23/24	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
137 VEHICLE (PUBLIC SERVICE)	FY 23/24	\$ 35,000.00	\$ 35,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
138 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 23/24	\$ 1,244,700.00	\$ 1,120,230.00	\$ 124,470.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
139 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 23/24	\$ 192,000.00	\$ 172,800.00	\$ 19,200.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
140 STREET INSTALL & REPLACEMENT-TOWN	FY 23/24	\$ 250,000.00	\$ 250,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
141 STREET INSTALL & REPLACEMENT-POWELL	FY 23/24	\$ 60,000.00	\$ 60,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
142 COMMUNITY PARK 1	FY 24/25	\$ 3,750,000.00	\$ 3,375,000.00	\$ 375,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
143 COMPREHENSIVE PEDESTRIAN PLAN IMPLEMENTATION	FY 24/25	\$ 1,956,750.00	\$ 1,761,075.00	\$ 195,675.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
144 VEHICLE PURCHASE (PLANNING)	FY 24/25	\$ 45,000.00	\$ 45,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
145 POLICE VEHICLES- 1 (new police officers);Turnover of olc	FY 24/25	\$ 240,000.00	\$ 240,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
146 CAR RADIOS	FY 24/25	\$ 42,000.00	\$ 42,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
147 IN-CAR CAMERAS	FY 24/25	\$ 33,000.00		\$ 33,000.00		\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -
148 POLICE BUILDING EXPANSION-Expansion of building intc	FY 24/25	\$ 100,000.00	\$ 100,000.00			\$ -	0.00%	1	1	\$0.00	\$ -	#NUM!	\$ -

Financial Plan
Town of Waxhaw
Revised 3/11/2015

REVENUE PROJECTIONS

FOOTNOTES:

	REVENUE	ACCOUNT CODE	REVENUES CATEGORY	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
1	Tax Penalties And Interest		TAX	\$ 11,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00
2	Motor Vehicle Tax		TAX	\$ 354,711.33	\$ 379,541.12	\$ 404,211.29	\$ 430,485.03	\$ 458,466.55	\$ 488,266.88	\$ 520,004.23	\$ 553,804.50	\$ 589,801.79	\$ 628,138.91	\$ 668,967.94
3	Property Taxes		TAX	\$ 4,943,141.09	\$ 5,136,252.92	\$ 5,470,109.36	\$ 5,825,666.47	\$ 6,204,334.79	\$ 6,607,616.55	\$ 7,037,111.62	\$ 7,494,523.88	\$ 7,981,667.93	\$ 8,500,476.35	\$ 9,053,007.31
4	NC State Sales Tax Revenue	12-310-001	OTHER	\$ 1,500,000.00	\$ 1,414,000.00	\$ 1,428,140.00	\$ 1,442,421.40	\$ 1,456,845.61	\$ 1,471,414.07	\$ 1,486,128.21	\$ 1,500,989.49	\$ 1,515,999.39	\$ 1,531,159.38	\$ 1,546,470.98
5	NC State Franchise Tax Revenue -	12-310-002	OTHER	\$ 220,000.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00	\$ 555,500.00
6	Sales Tax Refund	12-310-003	OTHER	\$ -	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00
7	Law Enforcement Distribution-ABC	12-310-004	OTHER	\$ 3,400.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
8	NC Gasoline Tax Reimb.	12-310-005	OTHER	\$ 30.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00
9	NC State Beer & Wine Revenue	12-310-006	OTHER	\$ 40,000.00	\$ 43,400.00	\$ 43,834.00	\$ 44,272.34	\$ 44,715.06	\$ 45,162.21	\$ 45,613.84	\$ 46,069.97	\$ 46,530.67	\$ 46,995.98	\$ 47,465.94
10	Surplus Property-Disposal Reve	12-310-008	S&S	\$ 5,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
11	ABC Revenue Waxhaw Store	12-310-009	OTHER	\$ 2,200.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
12	Nesbit Park Revenue/Rental	12-310-010	S&S	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
13	Miscellaneous Revenue	12-310-012	MISC	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
14	NCDOT R/W Mowing Reimb.	12-310-013	OTHER	\$ 4,300.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00
15	Property Damage Reimb.	12-310-014	OTHER	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16	Union County Court Fees-	12-310-015	OTHER	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00
17	Cable Franchise Revenue	12-310-016	S&S	\$ 10,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00
18	NC Solid Waste Disposal Fee Re	12-310-017	OTHER	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00	\$ 4,800.00
19	The Meeting Place Rental Fee	12-310-018	S&S	\$ 200.00										
20	Police Federal Forfeiture Rev	12-310-020	MISC	\$ -										
21	Police GID Enforcement Revenue	12-310-030	OTHER	\$ 1,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
22	Tree/Bench Donation Fund		D&S	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
23	Local Privilege License Fees	12-312-001	L&P	\$ 35,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
24	Zoning/Permitting Fees	12-312-002	L&P	\$ 75,000.00	\$ 45,000.00	\$ 46,350.00	\$ 47,740.50	\$ 49,172.72	\$ 50,647.90	\$ 52,167.33	\$ 53,732.35	\$ 55,344.32	\$ 57,004.65	\$ 58,714.79
25	Code Violation Fees/Liens	12-312-003	MISC	\$ 2,500.00	\$ 1,000.00	\$ 1,030.00	\$ 1,060.90	\$ 1,092.73	\$ 1,125.51	\$ 1,159.27	\$ 1,194.05	\$ 1,229.87	\$ 1,266.77	\$ 1,304.77
26	Building Inspection Fees	12-312-004	L&P	\$ 725,000.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00	\$ 312,500.00
27	Plan Reviewing Fees	12-312-005	S&S	\$ 85,000.00	\$ 32,000.00	\$ 32,800.00	\$ 33,620.00	\$ 34,460.50	\$ 35,322.01	\$ 36,205.06	\$ 37,110.19	\$ 38,037.94	\$ 38,988.89	\$ 39,963.62
28	Event Vendor Fees	12-312-006	L&P	\$ 20,000.00	\$ 21,000.00	\$ 22,000.00	\$ 23,000.00	\$ 24,000.00	\$ 25,000.00	\$ 26,000.00	\$ 27,000.00	\$ 28,000.00	\$ 29,000.00	\$ 30,000.00
29	Dog License Tag Fees	12-312-007	L&P	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
30	Incomplete Subdivision Fees	12-312-008	S&S	\$ -										
31	Homeowners Recovery Fund	12-312-009	S&S	\$ 5,400.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00
32	Police Reports/Misc Fees	12-312-010	S&S	\$ 300.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00
33	Local B/W Privilege License Fe	12-312-011	L&P	\$ 500.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00	\$ 120.00
34	Proof Roll Inspection Fees		S&S	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00
35	Technology Fees		S&S	\$ -										
36	Waxhaw Village News Adv. Fees	12-312-014	S&S	\$ 10,000.00	\$ 10,200.00	\$ 10,404.00	\$ 10,612.08	\$ 10,824.32	\$ 11,040.81	\$ 11,261.62	\$ 11,486.86	\$ 11,716.59	\$ 11,950.93	\$ 12,189.94
37	Parking Citations-Waxhaw	12-312-015	MISC	\$ 100.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00
38	Tree Mitigation Fund	12-312-016	S&S	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39	Rental Property Revenue			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40	Fire Inspection Fees	12-312-018	L&P	\$ 75,000.00	\$ 30,000.00	\$ 30,900.00	\$ 31,827.00	\$ 32,781.81	\$ 33,765.26	\$ 34,778.22	\$ 35,821.57	\$ 36,896.22	\$ 38,003.10	\$ 39,143.20
41	Pro-Rated Sanitation Fee	12-312-020	S&S	\$ -	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
42	Residential Sanitation Fees	12-312-020	S&S	\$ 356,736.00	\$ 381,707.52	\$ 406,518.51	\$ 432,942.21	\$ 461,083.46	\$ 491,053.88	\$ 522,972.38	\$ 556,965.59	\$ 593,168.35	\$ 631,724.29	\$ 672,786.37
43	Waxhaw Cemetery-Sales Of Lots	12-312-030	S&S	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00	\$ 5,400.00
44	Waxhaw Cemetery-Open/Closing	12-312-031	S&S	\$ 4,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00
45	Police Dept. Explorer Club	12-312-040	D&S	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
46	Infrastructure-Stormwater Testing	12-312-050	S&S	\$ 12,000.00	\$ 2,500.00	\$ 2,575.00	\$ 2,652.25	\$ 2,731.82	\$ 2,813.77	\$ 2,898.19	\$ 2,985.13	\$ 3,074.68	\$ 3,166.93	\$ 3,261.93
47	Caboose Donations Fund	12-312-070	D&S	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00

Parks and Recreation

48	General Fund Checking- Interes	12-315-001	MISC	\$ 30.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00	\$ 50.00
49	General Fund- CD- Interest	12-315-005	MISC	\$ 250.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
50	Money Market-Inv. Acct. Intere	12-315-015	MISC	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
51	Interest Jewell K - CD	12-315-016	MISC	\$ -												
52	Interest Cash Management	12-315-017	MISC	\$ -												
53	Powell Fund Interest	12-315-020	MISC	\$ 50.00												
54	Small Town Main St Donations	12-316-002	D&S	\$ 500.00												
55	Carolina Thread Grant		GRANT	\$ -												
56	Forestry Grant		GRANT	\$ -												
57	NC DOT Pedestrian Grant		GRANT	\$ -												
58	Safety Grant Revenue		GRANT	\$ -												
59	NC Gov.Grant-Special Resp		OTHER	\$ -												
60	NC Governor's - Viper/Crime Gr		OTHER	\$ -												
61	Police Grant Revnues		GRANT	\$ -												
62	Events Donation		D&S	\$ 4,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00
63	Event Sponsorships		D&S	\$ 17,500.00	\$ 20,000.00	\$ 20,000.00	\$ 22,500.00	\$ 25,000.00	\$ 27,500.00	\$ 30,000.00	\$ 35,000.00	\$ 40,000.00	\$ 45,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
64	Police/DARE Donations		D&S	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00
65	Park & Rec Donations		D&S	\$ -												
66	Powell Fund Revenue		LGA	\$ 295,000.00	\$ 307,261.50	\$ 322,624.58	\$ 338,755.80	\$ 355,693.59	\$ 373,478.27	\$ 392,152.19	\$ 411,759.80	\$ 432,347.79	\$ 453,965.18	\$ 476,663.43	\$ 476,663.43	\$ 476,663.43
67																
	Totals:			\$ 8,847,348.41	\$ 8,780,833.06	\$ 9,198,466.73	\$ 9,644,525.98	\$ 10,118,172.96	\$ 10,621,177.13	\$ 11,155,422.17	\$ 11,725,413.38	\$ 12,330,785.56	\$ 12,973,811.36	\$ 13,656,910.23	\$ 13,656,910.23	\$ 13,656,910.23

FOOTNOTES:

- 2 Motor vehicle tax expected to follow property value trend - 7% for 15/16 and decrease to a constant 6.5% in 16/17
- 3 Property tax (Real property, personal property, & Public Utilities) expected to increase 7% for 15/16 and decrease to a constant 6.5% in 16/17
- 4 NC Sales Tax Revenue is \$1,400,000 reality for 2014-2015. Expect 1% increase per year
- 5 Currently on track to earn \$550,000. Increase 1% per year
- 9 NC State Beer & Wine Revenue-2015-2016 Based on 3 year average. 1% addition going forward
- 42 Residental Sanitation Fees - Based on Property Tax increases shown above
- 66 Powell Fund Revenue - Based on 5% increase per year

Financial Plan
Town of Waxhaw
Revised 3/11/2015

PROPERTY TAX REVENUE PROJECTIONS

% Change in Tax Base
7.00% 7.00% 6.50%

	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015 Projected	2015-2016 ¹	2016-2017
Assessed Value of Taxable Real Property							
Residential	\$ 1,019,542,480.00	\$ 1,059,496,810.00	\$ 1,102,329,760.00	\$ 1,192,026,350.00	\$ 1,275,468,194.50	\$ 1,323,808,439.07	\$ 1,409,855,987.61
Commercial	\$ 121,250,550.00	\$ 120,633,700.00	\$ 122,325,040.00	\$ 120,438,310.00	\$ 128,868,991.70	\$ 133,753,126.49	\$ 142,447,079.71
Industrial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	\$ 19,468,450.00	\$ 26,421,560.00	\$ 3,154,461.00	\$ 993,395.00	\$ 1,062,932.65	\$ 1,103,217.80	\$ 1,174,926.95
Exemptions	\$ 17,966,830.00	\$ 25,725,415.00	\$ 3,918,922.00	\$ 4,087,407.00	\$ 4,373,525.49	\$ 4,539,282.11	\$ 4,834,335.44
Total Taxable Valuation of Real Property	\$ 1,142,294,650.00	\$ 1,180,826,655.00	\$ 1,223,890,339.00	\$ 1,309,370,648.00	\$ 1,401,026,593.36	\$ 1,454,125,501.25	\$ 1,548,643,658.83
Total Taxable Valuation of Personal Property	\$ 21,373,600.00	\$ 20,666,759.00	\$ 23,587,015.00	\$ 22,215,285.00	\$ 23,770,354.95	\$ 25,434,279.80	\$ 27,087,507.98
Total Taxable Valuation of Public Service Companies	\$ 21,148,518.00	\$ 21,291,202.00	\$ 24,275,166.00	\$ 27,166,427.00	\$ 29,068,076.89	\$ 31,102,842.27	\$ 33,124,527.02
Total Taxable Valuation of Motor Vehicles	\$ 70,881,200.00	\$ 76,535,463.00	\$ 88,964,936.00	\$ 97,501,739.00	\$ 104,326,860.73	\$ 111,629,740.98	\$ 118,885,674.14
Tax Rate	\$ 0.34						
Municipal Levies							
Total Levy of Real Property	\$ 3,883,801.81	\$ 4,014,810.63	\$ 4,161,227.15	\$ 4,451,860.20	\$ 4,763,490.42	\$ 4,944,026.70	\$ 5,265,388.44
Total Levy of Personal Property	\$ 72,670.24	\$ 70,266.98	\$ 80,195.85	\$ 75,531.97	\$ 80,819.21	\$ 86,476.55	\$ 92,097.53
Total Levy of Public Service Companies	\$ 71,904.96	\$ 72,390.09	\$ 82,535.56	\$ 92,365.85	\$ 98,831.46	\$ 105,749.66	\$ 112,623.39
Total Levy of Motor Vehicles	\$ 240,996.08	\$ 260,220.57	\$ 302,480.78	\$ 331,505.91	\$ 354,711.33	\$ 379,541.12	\$ 404,211.29
Total Levy	\$ 4,269,373.09	\$ 4,417,688.27	\$ 4,626,439.35	\$ 4,951,263.94	\$ 5,297,852.41	\$ 5,515,794.04	\$ 5,874,320.65
Percent Change		3.47%	4.73%	7.02%	7%	4.11%	6.50%
Residential value change		\$ 39,954,330.00	\$ 42,832,950.00	\$ 89,696,590.00			
Residential % Change		3.92%	4.04%	8.14%			
Commercial value change		\$ (616,850.00)	\$ 1,691,340.00	\$ (1,886,730.00)			
Commercial % Change		-0.51%	1.40%	-1.54%			
Total Real Property % Change		3.37%	3.65%	6.98%			
AVG RESIDENTIAL SFR VALUE ADDED (NEW CONSTRUCTION)		\$ 114,155.23	\$ 122,379.86	\$ 179,393.18			
RESIDENTIAL TAX MIX	89.25%	89.73%	90.07%	91.04%			
COMMERCIAL TAX MIX	10.61%	10.22%	9.99%	9.20%			
Per Capita Market Value				\$ 109,114.22			

Assumptions

1 3% reduction in real property value projected from Union County Revaluation for 2015/2016

**Financial Plan
Town of Waxhaw
Revised 3/11/2015**

PROPERTY TAX REVENUE PROJECTIONS

6.50% 6.50% 6.50% 6.50% 6.50% 6.50% 6.50%

	<u>2017-2018</u>	<u>2018-2019</u>	<u>2019-2020</u>	<u>2020-2021</u>	<u>2021-2022</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>
Value of Taxable Real Property								
Residential	\$ 1,501,496,626.81	\$ 1,599,093,907.55	\$ 1,703,035,011.54	\$ 1,813,732,287.29	\$ 1,931,624,885.96	\$ 2,057,180,503.55	\$ 2,190,897,236.28	\$ 2,333,305,556.64
Commercial	\$ 151,706,139.89	\$ 161,567,038.98	\$ 172,068,896.51	\$ 183,253,374.79	\$ 195,164,844.15	\$ 207,850,559.02	\$ 221,360,845.35	\$ 235,749,300.30
Industrial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	\$ 1,251,297.21	\$ 1,332,631.52	\$ 1,419,252.57	\$ 1,511,503.99	\$ 1,609,751.75	\$ 1,714,385.61	\$ 1,825,820.68	\$ 1,944,499.02
Exemptions	\$ 5,148,567.25	\$ 5,483,224.12	\$ 5,839,633.69	\$ 6,219,209.88	\$ 6,623,458.52	\$ 7,053,983.32	\$ 7,512,492.24	\$ 8,000,804.23
Total Taxable Valuation of Real Property	\$ 1,649,305,496.65	\$ 1,756,510,353.94	\$ 1,870,683,526.94	\$ 1,992,277,956.19	\$ 2,121,776,023.35	\$ 2,259,691,464.86	\$ 2,406,571,410.08	\$ 2,562,998,551.73
Total Taxable Valuation of Personal Property	\$ 28,848,196.00	\$ 30,723,328.74	\$ 32,720,345.11	\$ 34,847,167.54	\$ 37,112,233.43	\$ 39,524,528.61	\$ 42,093,622.97	\$ 44,829,708.46
Total Taxable Valuation of Public Service Companies	\$ 35,277,621.28	\$ 37,570,666.66	\$ 40,012,759.99	\$ 42,613,589.39	\$ 45,383,472.70	\$ 48,333,398.43	\$ 51,475,069.33	\$ 54,820,948.83
Total Taxable Valuation of Motor Vehicles	\$ 126,613,242.96	\$ 134,843,103.76	\$ 143,607,905.50	\$ 152,942,419.36	\$ 162,883,676.62	\$ 173,471,115.60	\$ 184,746,738.11	\$ 196,755,276.09
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Tax Rate	\$ 0.34							
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Levies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Levy of Real Property	\$ 5,607,638.69	\$ 5,972,135.20	\$ 6,360,323.99	\$ 6,773,745.05	\$ 7,214,038.48	\$ 7,682,950.98	\$ 8,182,342.79	\$ 8,714,195.08
Total Levy of Personal Property	\$ 98,083.87	\$ 104,459.32	\$ 111,249.17	\$ 118,480.37	\$ 126,181.59	\$ 134,383.40	\$ 143,118.32	\$ 152,421.01
Total Levy of Public Service Companies	\$ 119,943.91	\$ 127,740.27	\$ 136,043.38	\$ 144,886.20	\$ 154,303.81	\$ 164,333.55	\$ 175,015.24	\$ 186,391.23
Total Levy of Motor Vehicles	\$ 430,485.03	\$ 458,466.55	\$ 488,266.88	\$ 520,004.23	\$ 553,804.50	\$ 589,801.79	\$ 628,138.91	\$ 668,967.94
Total Levy	\$ 6,256,151.49	\$ 6,662,801.34	\$ 7,095,883.43	\$ 7,557,115.85	\$ 8,048,328.38	\$ 8,571,469.73	\$ 9,128,615.26	\$ 9,721,975.25
Percent Change	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%

Residential value change
Residential % Change
Commercial value change
Commercial % Change
Total Real Property % Change

AVG RESIDENTIAL SFR VALUE ADDED (NEW CONSTRUCTION)

RESIDENTIAL TAX MIX
COMMERCIAL TAX MIX

Per Capita Market Value

ns
3% reduction in real property value projected from Union Co

Financial Plan
Town of Waxhaw
Revised 3/11/2015
Expense Projections

3/17/2015 15:56

GENERAL FUND

EXPENSE PROJECTIONS BY DEPARTMENT	FY 12/13	FY 13/14	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	FY 24/25
ADMINISTRATION													
PERSONNEL (PS)			\$ 878,697.00	\$ 1,310,239.11	\$ 1,424,951.70	\$ 1,540,352.95	\$ 1,605,040.79	\$ 1,675,612.38	\$ 1,856,428.65	\$ 1,945,711.28	\$ 2,121,701.21	\$ 2,234,754.11	\$ 2,361,354.23
TRAVEL, TRAINING & EDUCATION (TTE)			\$ 62,940.00	\$ 69,599.25	\$ 67,415.74	\$ 68,353.27	\$ 69,312.40	\$ 70,293.70	\$ 71,297.75	\$ 72,325.15	\$ 73,376.54	\$ 74,452.55	\$ 75,553.83
VEHICLES & MAINTENANCE (VM)			\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00	\$ 800.00
BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 76,409.00	\$ 76,750.00	\$ 77,098.45	\$ 82,454.50	\$ 38,631.33	\$ 39,003.11	\$ 39,383.02	\$ 50,477.23	\$ 50,873.94	\$ 51,279.31	\$ 34,565.56
FEES & EXPENSES (FE)			\$ 179,600.00	\$ 268,427.00	\$ 271,248.80	\$ 296,833.83	\$ 302,186.57	\$ 305,202.51	\$ 218,916.20	\$ 222,069.22	\$ 225,293.18	\$ 228,589.73	\$ 231,960.57
EQUIP, SUPPLIES & MISC. (ESM)			\$ 118,985.00	\$ 126,540.80	\$ 132,384.42	\$ 141,881.60	\$ 146,575.43	\$ 150,950.25	\$ 156,014.61	\$ 160,777.50	\$ 165,748.32	\$ 179,876.38	\$ 185,715.18
BOARDS & COMMISSIONS (BC)			\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
PROJECTS, PLANS & STUDIES (PPS)			\$ 22,850.00	\$ 62,850.00	\$ 72,850.00	\$ 82,850.00	\$ 92,850.00	\$ 102,850.00	\$ 112,850.00	\$ 122,850.00	\$ 132,850.00	\$ 142,850.00	\$ 152,850.00
ELECTIONS (EL)			\$ 4,000.00	\$ 4,000.00	\$ 10,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 12,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 14,000.00
TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 45,350.00	\$ 27,160.00	\$ 27,431.60	\$ 30,505.92	\$ 30,810.98	\$ 31,119.09	\$ 31,430.28	\$ 31,744.58	\$ 32,062.03	\$ 32,382.65	\$ 32,706.48
TOTAL ADMINISTRATION	\$ 1,391,607.00	\$ 1,485,604.00	\$ 1,409,631.00	\$ 1,966,366.16	\$ 2,104,180.70	\$ 2,268,032.08	\$ 2,310,207.50	\$ 2,399,831.04	\$ 2,519,120.51	\$ 2,630,754.97	\$ 2,826,705.21	\$ 2,968,984.74	\$ 3,109,505.86
BUILDING INSPECTIONS													
PERSONNEL (PS)			\$ 411,081.00	\$ 434,235.09	\$ 506,694.59	\$ 533,302.34	\$ 562,973.03	\$ 596,250.18	\$ 689,905.18	\$ 734,151.05	\$ 784,412.98	\$ 841,807.62	\$ 907,672.27
TRAVEL, TRAINING & EDUCATION (TTE)			\$ 8,230.00	\$ 8,394.60	\$ 8,562.49	\$ 8,733.74	\$ 8,908.42	\$ 9,086.59	\$ 9,268.32	\$ 9,453.68	\$ 9,642.76	\$ 9,835.61	\$ 10,032.32
VEHICLES & MAINTENANCE (VM)			\$ 5,340.00	\$ 5,446.80	\$ 5,555.74	\$ 5,666.85	\$ 5,780.19	\$ 5,895.79	\$ 6,013.71	\$ 6,133.98	\$ 6,256.66	\$ 6,381.79	\$ 6,509.43
BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 3,445.00	\$ 6,289.40	\$ 6,415.19	\$ 6,543.49	\$ 6,674.36	\$ 6,807.85	\$ 6,944.01	\$ 7,082.89	\$ 7,224.54	\$ 7,369.03	\$ 7,516.42
FEES & EXPENSES (FE)			\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00
EQUIP, SUPPLIES & MISC. (ESM)			\$ 33,644.00	\$ 34,316.88	\$ 35,003.22	\$ 35,703.28	\$ 36,417.35	\$ 37,145.69	\$ 37,888.61	\$ 38,646.38	\$ 39,419.31	\$ 40,207.69	\$ 41,011.85
BOARDS & COMMISSIONS (BC)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PROJECTS, PLANS & STUDIES (PPS)			\$ 5,400.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00
TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 40,960.00	\$ 42,712.15	\$ 43,676.39	\$ 44,665.41	\$ 45,679.99	\$ 46,720.92	\$ 47,789.04	\$ 48,885.21	\$ 50,010.32	\$ 51,165.30	\$ 52,351.12
TOTAL BUILDING INSPECTIONS	\$ 197,409.00	\$ 296,602.00	\$ 515,300.00	\$ 542,194.92	\$ 616,707.61	\$ 645,415.12	\$ 677,233.33	\$ 712,707.02	\$ 808,608.87	\$ 855,153.19	\$ 907,766.57	\$ 967,567.06	\$ 1,035,893.41
EVENTS													
PROJECTS, PLANS & STUDIES			\$ 165,900.00	\$ 220,850.00	\$ 234,560.00	\$ 254,420.00	\$ 275,380.00	\$ 281,640.00	\$ 294,900.00	\$ 303,160.00	\$ 313,420.00	\$ 334,680.00	\$ 344,940.00
NEWSLETTER			\$ 10,000.00	\$ 10,000.00	\$ 10,500.00	\$ 11,000.00	\$ 11,500.00	\$ 12,000.00	\$ 12,500.00	\$ 13,000.00	\$ 13,500.00	\$ 14,000.00	\$ 14,500.00
SMALL TOWN MAIN STREET			\$ 29,190.00	\$ 37,925.00	\$ 39,775.00	\$ 42,125.00	\$ 44,475.00	\$ 51,825.00	\$ 49,175.00	\$ 51,525.00	\$ 53,875.00	\$ 56,225.00	\$ 63,575.00
TOTAL EVENTS			\$ 205,090.00	\$ 268,775.00	\$ 284,835.00	\$ 307,545.00	\$ 331,355.00	\$ 345,465.00	\$ 356,575.00	\$ 367,685.00	\$ 380,795.00	\$ 404,905.00	\$ 423,015.00
HUMAN RESOURCES													
PERSONNEL (PS)			\$ 75,407.00	\$ 104,885.46	\$ 107,979.26	\$ 160,326.85	\$ 167,431.66	\$ 175,221.40	\$ 183,811.15	\$ 193,567.95	\$ 204,505.71	\$ 216,449.81	\$ 229,918.03
TRAVEL, TRAINING & EDUCATION (TTE)			\$ -	\$ 3,900.00	\$ 3,900.00	\$ 3,975.00	\$ 3,975.00	\$ 3,975.00	\$ 3,975.00	\$ 3,975.00	\$ 3,275.00	\$ 3,975.00	\$ 3,975.00
VEHICLES & MAINTENANCE (VM)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
BUILDING UTILITIES & MAINTENANCE (BUM)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
FEES & EXPENSES (FE)			\$ 10,040.00	\$ 2,700.00	\$ 5,236.00	\$ 2,770.00	\$ 5,405.00	\$ 3,040.00	\$ 5,775.00	\$ 3,310.00	\$ 6,045.00	\$ 3,580.00	\$ 6,315.00
EQUIP, SUPPLIES & MISC. (ESM)			\$ -	\$ 2,600.00	\$ 2,620.00	\$ 3,170.40	\$ 2,661.21	\$ 2,682.43	\$ 2,704.08	\$ 2,726.16	\$ 2,748.69	\$ 2,771.66	\$ 2,795.09
BOARDS & COMMISSIONS (BC)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PROJECTS, PLANS & STUDIES (PPS)			\$ 3,000.00	\$ 6,360.00	\$ 6,461.00	\$ 6,563.00	\$ 6,667.00	\$ 6,773.00	\$ 6,882.00	\$ 6,993.00	\$ 7,106.00	\$ 7,221.00	\$ 7,338.00
TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ -	\$ 51,000.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00	\$ 5,500.00
TOTAL HUMAN RESOURCES			\$ 88,447.00	\$ 171,445.46	\$ 131,696.26	\$ 182,305.25	\$ 191,639.87	\$ 197,191.83	\$ 208,647.23	\$ 216,072.12	\$ 229,180.40	\$ 239,497.47	\$ 255,841.12

EXPENSE PROJECTIONS BY DEPARTMENT		FY 12/13	FY 13/14	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	FY 24/25
44	PARKS & RECREATION													
45	PERSONNEL (PS)			\$ 69,127.00	\$ 101,171.59	\$ 161,700.68	\$ 220,585.75	\$ 320,283.83	\$ 369,719.48	\$ 421,105.47	\$ 437,113.92	\$ 454,283.73	\$ 472,785.76	\$ 492,823.20
46	TRAVEL, TRAINING & EDUCATION (TTE)			\$ 1,000.00	\$ 4,200.00	\$ 4,750.00	\$ 4,900.00	\$ 4,950.00	\$ 5,100.00	\$ 5,150.00	\$ 5,150.00	\$ 5,150.00	\$ 5,150.00	\$ 5,150.00
47	VEHICLES & MAINTENANCE (VM)			\$ -	\$ 150.00	\$ 200.00	\$ 200.00	\$ 400.00	\$ 400.00	\$ 600.00	\$ 800.00	\$ 600.00	\$ 600.00	\$ 600.00
48	BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 20,000.00	\$ 20,400.00	\$ 20,808.00	\$ 21,224.16	\$ 177,648.64	\$ 181,201.62	\$ 184,825.65	\$ 188,522.16	\$ 192,292.60	\$ 196,138.46	\$ 200,061.23
49	FEES & EXPENSES (FE)			\$ 41,600.00	\$ 52,700.00	\$ 71,200.00	\$ 86,200.00	\$ 142,200.00	\$ 81,000.00	\$ 464,000.00	\$ 86,000.00	\$ 493,000.00	\$ 87,000.00	\$ 87,000.00
50	EQUIP, SUPPLIES & MISC. (ESM)			\$ 2,600.00	\$ 18,900.00	\$ 19,520.00	\$ 21,070.40	\$ 21,621.81	\$ 22,674.24	\$ 22,727.73	\$ 23,782.28	\$ 23,837.93	\$ 24,894.69	\$ 24,952.58
51	BOARDS & COMMISSIONS (BC)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52	PROJECTS, PLANS & STUDIES (PPS)			\$ 18,000.00	\$ 36,000.00	\$ 21,000.00	\$ 96,000.00	\$ 26,000.00	\$ 17,000.00	\$ 1,000.00	\$ 17,000.00	\$ 1,000.00	\$ 18,000.00	\$ 1,000.00
53	TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 2,200.00	\$ 1,100.00	\$ 22,500.00	\$ 2,200.00	\$ 4,400.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 2,200.00	\$ 27,200.00
54	TOTAL PARKS & RECREATION			\$ 154,527.00	\$ 234,621.59	\$ 321,678.68	\$ 452,380.31	\$ 697,504.28	\$ 679,295.34	\$ 1,101,608.85	\$ 760,568.36	\$ 1,172,364.26	\$ 806,768.90	\$ 838,787.00
55														
56	PLANNING & COMMUNITY DEVELOPMENT													
57	PERSONNEL (PS)			\$ 569,883.00	\$ 599,823.62	\$ 671,781.69	\$ 785,002.37	\$ 823,277.53	\$ 915,526.56	\$ 964,128.68	\$ 1,018,386.16	\$ 1,129,213.76	\$ 1,199,491.66	\$ 1,279,122.66
58	TRAVEL, TRAINING & EDUCATION (TTE)			\$ 18,286.00	\$ 18,651.72	\$ 19,024.75	\$ 19,405.25	\$ 19,793.35	\$ 20,189.22	\$ 20,593.01	\$ 21,004.87	\$ 21,424.96	\$ 21,853.46	\$ 22,290.53
59	VEHICLES & MAINTENANCE (VM)			\$ 2,530.00	\$ 2,669.50	\$ 2,729.59	\$ 2,791.07	\$ 2,854.00	\$ 2,918.39	\$ 2,984.30	\$ 3,051.74	\$ 3,120.77	\$ 3,191.42	\$ 3,263.73
60	BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 3,445.00	\$ 6,289.40	\$ 6,415.19	\$ 6,543.49	\$ 6,674.36	\$ 6,807.85	\$ 6,944.01	\$ 7,082.89	\$ 7,224.54	\$ 7,369.03	\$ 7,516.42
61	FEES & EXPENSES (FE)			\$ 7,500.00	\$ 5,000.00	\$ 155,000.00	\$ 170,000.00	\$ 186,500.00	\$ 204,650.00	\$ 224,615.00	\$ 246,576.50	\$ 270,734.15	\$ 297,307.57	\$ 326,538.32
62	EQUIP, SUPPLIES & MISC. (ESM)			\$ 55,319.00	\$ 57,523.88	\$ 58,634.36	\$ 59,767.04	\$ 60,922.39	\$ 62,100.83	\$ 63,302.85	\$ 64,528.91	\$ 65,779.49	\$ 67,055.07	\$ 68,356.18
63	BOARDS & COMMISSIONS (BC)			\$ 8,375.00	\$ 8,400.00	\$ 8,472.00	\$ 8,545.44	\$ 8,620.35	\$ 8,696.76	\$ 8,774.69	\$ 8,854.18	\$ 8,935.27	\$ 9,017.97	\$ 9,102.33
64	PROJECTS, PLANS & STUDIES (PPS)			\$ 325,994.00	\$ 90,000.00	\$ 56,000.00	\$ 167,020.00	\$ 118,060.40	\$ 59,121.61	\$ 60,204.04	\$ 171,308.12	\$ 122,434.28	\$ 63,582.97	\$ 64,754.63
65	TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 23,056.00	\$ 24,200.00	\$ 24,716.00	\$ 25,243.28	\$ 25,782.09	\$ 26,332.70	\$ 26,895.37	\$ 27,470.38	\$ 28,058.00	\$ 28,658.51	\$ 29,272.22
66	TOTAL PLANNING & COMMUNITY DEVELOPMENT	\$ 913,462.00	\$ 840,986.00	\$ 1,014,388.00	\$ 812,558.12	\$ 1,002,773.58	\$ 1,244,317.94	\$ 1,252,484.47	\$ 1,306,343.92	\$ 1,378,441.95	\$ 1,568,263.74	\$ 1,656,925.22	\$ 1,697,527.67	\$ 1,810,217.02
67														
68	POLICE													
69	PERSONNEL (PS)			\$ 1,632,124.00	\$ 1,819,409.82	\$ 2,065,713.69	\$ 2,285,079.76	\$ 2,577,508.12	\$ 2,778,166.27	\$ 3,000,211.18	\$ 3,246,108.54	\$ 3,520,000.68	\$ 3,826,833.86	\$ 4,172,528.23
70	TRAVEL, TRAINING & EDUCATION (TTE)			\$ 26,735.00	\$ 40,000.00	\$ 49,000.00	\$ 55,000.00	\$ 64,000.00	\$ 70,000.00	\$ 73,000.00	\$ 76,000.00	\$ 79,000.00	\$ 82,000.00	\$ 85,000.00
71	VEHICLES & MAINTENANCE (VM)			\$ 125,000.00	\$ 130,400.00	\$ 138,800.00	\$ 144,800.00	\$ 156,200.00	\$ 159,200.00	\$ 162,200.00	\$ 165,200.00	\$ 168,200.00	\$ 171,200.00	\$ 174,200.00
72	BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 59,365.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00	\$ 76,500.00
73	FEES & EXPENSES (FE)			\$ 18,000.00	\$ 16,000.00	\$ 16,000.00	\$ 17,000.00	\$ 17,000.00	\$ 17,000.00	\$ 23,000.00	\$ 23,000.00	\$ 23,000.00	\$ 24,000.00	\$ 24,000.00
74	EQUIP, SUPPLIES & MISC. (ESM)			\$ 75,480.00	\$ 78,930.00	\$ 82,780.00	\$ 85,430.00	\$ 89,280.00	\$ 90,730.00	\$ 92,180.00	\$ 93,630.00	\$ 95,080.00	\$ 96,530.00	\$ 97,980.00
75	BOARDS & COMMISSIONS (BC)			\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00
76	PROJECTS, PLANS & STUDIES (PPS)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
77	TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 62,300.00	\$ 63,800.00	\$ 66,800.00	\$ 69,800.00	\$ 74,300.00	\$ 75,800.00	\$ 77,300.00	\$ 78,800.00	\$ 80,300.00	\$ 81,800.00	\$ 83,300.00
78	TOTAL POLICE	\$ 1,656,934.00	\$ 1,856,791.00	\$ 2,001,004.00	\$ 2,227,039.82	\$ 2,497,593.69	\$ 2,735,609.76	\$ 3,056,788.12	\$ 3,269,396.27	\$ 3,506,391.18	\$ 3,761,238.54	\$ 4,044,080.68	\$ 4,360,863.86	\$ 4,715,508.23
79														
80	PUBLIC SERVICES													
81	PERSONNEL (PS)			\$ 579,847.00	\$ 639,137.24	\$ 784,077.00	\$ 827,218.41	\$ 875,149.19	\$ 1,120,644.46	\$ 1,186,421.58	\$ 1,260,027.69	\$ 1,566,458.65	\$ 1,666,695.94	\$ 1,779,815.44
82	TRAVEL, TRAINING & EDUCATION (TTE)			\$ 10,300.00	\$ 10,300.00	\$ 12,250.00	\$ 12,250.00	\$ 12,250.00	\$ 13,750.00	\$ 13,750.00	\$ 13,750.00	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00
83	VEHICLES & MAINTENANCE (VM)			\$ 23,500.00	\$ 27,300.00	\$ 29,065.00	\$ 30,959.00	\$ 34,055.00	\$ 36,290.00	\$ 38,790.00	\$ 41,374.00	\$ 44,181.00	\$ 47,169.00	\$ 50,384.00
84	BUILDING UTILITIES & MAINTENANCE (BUM)			\$ 11,600.00	\$ 28,000.00	\$ 22,000.00	\$ 22,000.00	\$ 22,000.00	\$ 24,000.00	\$ 24,500.00	\$ 24,500.00	\$ 25,500.00	\$ 25,500.00	\$ 25,500.00
85	FEES & EXPENSES (FE)			\$ 25,000.00	\$ 35,000.00	\$ 31,850.00	\$ 32,785.00	\$ 33,813.00	\$ 37,944.00	\$ 39,168.00	\$ 40,557.00	\$ 45,563.00	\$ 47,219.00	\$ 49,041.00
86	STREETS			\$ 432,600.00	\$ 463,700.00	\$ 492,020.00	\$ 527,562.00	\$ 560,118.00	\$ 578,621.00	\$ 609,033.00	\$ 641,936.00	\$ 667,580.00	\$ 689,374.00	\$ 728,662.00
87	PARKS			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
88	SANITATION			\$ 980,000.00	\$ 1,078,000.00	\$ 1,185,800.00	\$ 1,304,380.00	\$ 1,434,818.00	\$ 1,578,299.00	\$ 1,594,028.00	\$ 1,753,430.00	\$ 1,928,773.00	\$ 2,121,650.00	\$ 2,333,815.00
89	EQUIP, SUPPLIES & MISC. (ESM)			\$ 50,525.00	\$ 65,300.00	\$ 60,840.00	\$ 62,802.00	\$ 64,772.00	\$ 68,539.00	\$ 71,213.00	\$ 73,004.00	\$ 77,624.00	\$ 80,686.00	\$ 84,905.00
90	BOARDS & COMMISSIONS (BC)			\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 18,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
91	PROJECTS, PLANS & STUDIES (PPS)			\$ 232,700.00	\$ 1,031,200.00	\$ 33,200.00	\$ 33,500.00	\$ 37,500.00	\$ 37,500.00	\$ 39,000.00	\$ 39,000.00	\$ 42,000.00	\$ 43,500.00	\$ 44,500.00
92	TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 5,206.00	\$ 5,362.18	\$ 5,523.05	\$ 5,688.74	\$ 5,859.40	\$ 6,035.18	\$ 6,216.24	\$ 6,402.72	\$ 6,594.81	\$ 6,792.65	\$ 6,996.43
93	TOTAL PUBLIC SERVICES	\$ 1,628,592.00	\$ 2,012,910.00	\$ 2,366,278.00	\$ 3,398,299.42	\$ 2,671,625.04	\$ 2,874,145.15	\$ 3,098,334.59	\$ 3,519,622.64	\$ 3,640,119.82	\$ 3,911,981.42	\$ 4,440,274.45	\$ 4,764,586.59	\$ 5,139,618.87
94														
95	TECHNOLOGY													
96	TRAVEL, TRAINING & EDUCATION (TTE)			\$ -	\$ 3,500.00	\$ 4,000.00	\$ 3,000.00	\$ 6,000.00	\$ 4,000.00	\$ 2,000.00	\$ 3,000.00	\$ 14,000.00	\$ 4,000.00	\$ 20,000.00
97	EQUIP, SUPPLIES & MISC. (ESM)			\$ -	\$ 5,000.00	\$ 4,000.00	\$ 14,000.00	\$ 7,000.00	\$ 10,000.00	\$ 25,000.00	\$ 7,000.00	\$ 10,000.00	\$ 37,000.00	\$ 11,000.00
98	PROJECTS, PLANS & STUDIES (PPS)			\$ -	\$ 500.00	\$ 2,000.00	\$ -	\$ 3,000.00	\$ -	\$ 5,000.00	\$ -	\$ 10,000.00	\$ -	\$ -
99	TECHNOLOGY SUPPORT, EQUIPMENT, SOFTWARE (TES)			\$ 5,000.00	\$ 115,900.00	\$ 52,800.00	\$ 159,300.00	\$ 178,500.00	\$ 179,900.00	\$ 138,200.00	\$ 187,500.00	\$ 179,900.00	\$ 285,800.00	\$ 222,800.00
100	TOTAL TECHNOLOGY			\$ 5,000.00	\$ 124,900.00	\$ 62,800.00	\$ 176,300.00	\$ 194,500.00	\$ 193,900.00	\$ 170,200.00	\$ 197,500.00	\$ 213,900.00	\$ 326,800.00	\$ 253,800.00



V. Old Business

- D. Discussion and Possible Action on Letter of Intent with YMCA for use of Adjacent Town Property and Collaborative Programming
Presenter: [Steve Maher](#)

Information

The YMCA is considering opening a branch within the municipal limits. The parties have discussed a private / public partnership where the Town will acquire approximately 13 acres of adjacent property and the YMCA can use and maintain this property to provide certain recreational activities. The Letter of Intent is not a final agreement but outlines the major terms and provisions for a final agreement.

Board Action

- Possible approval of Letter of Intent with YMCA.



V. Old Business

- E. Discussion and Possible Action of Agreement for the Acquisition of Approximately 13 Acres from Wells Fargo in Conjunction with the Waxhaw YMCA

Presenter: [Chaplin Spencer](#)

Information

The YMCA is considering opening a branch within the municipal limits. The parties have discussed a private / public partnership where the Town will acquire the adjacent 13 acres and allow the YMCA to use the property for certain recreational activities. The contract is for the purchase of this property from Wells Fargo for \$1.3 million subject to certain conditions including the Town's due diligence.

Board Action

- Possible approval of agreement with Wells Fargo to acquire approximately 13 acres.



VI. New Business

- A. Update and Discussion on the Comprehensive Plan
Presenter: [Benchmark](#)

Information

Update from Benchmark on the progress of the Comprehensive Plan.

Board Action

- No action at this time.



VI. New Business

- B. Presentation of Salary Study by CCOG
Presenter: [Bob Henderson](#)

Information

Bob Henderson with Centralina Council of Governments will be presenting a salary study for the Town of Waxhaw.

Board Action

- No action at this time.



March 4, 2015

Ms. Wendy Davenport, Human Resources Director
Town of Waxhaw
PO Box 6
Waxhaw, NC 28173

Dear Ms. Davenport:

Several weeks ago Centralina Council of Governments began a review of the Town's compensation plan. This overview will identify:

- I. Survey Methodology
- II. Analysis and Observations
- III. Possible Strategies to Address Concerns
- IV. Summary of Benefits Survey, and
- V. Summary of Salary Survey

I. **Survey Methodology**

Centralina staff met with the Interim Town Manager and Human Resources Director to determine the causes of concern with the Town's current salary plan and to set parameters for the compensation study. As part of these discussions, the market area for this study was determined, presented to and approved by the Interim Town Manager and Human Resources Director. Respondents included the following jurisdictions: Boone, Cornelius, Harrisburg, Huntersville, Matthews, Pineville, Smithfield, Stallings, and Statesville. Limited private sector data that was gathered from the "Wage and Salary Survey 2013", a publication of *The Employers Association* that lists the results of their survey including job titles and descriptions.

The defined market area included regional and statewide jurisdictions with similar market influences and service delivery and also included a sampling of local jurisdictions and the private sector. The local market was not limited to like-sized jurisdictions or industries but included those jurisdictions and private sector employers who reside in our geographic/commuting area and compete for a common workforce. The defined market area was used to collect information on the salaries and benefits provided by municipalities to their employees. Information on employee leave, insurance and retirement benefits were requested in the surveys and used in the analysis of the total compensation package offered by the Town.

525 North Tryon Street – 12th Floor
Charlotte, North Carolina 28202
Phone: 704-372-2416 Fax: 704-347-4710
www.centralina.org

The survey instrument was derived from job descriptions used by the Town; instructions to participants requested that the surveys be returned directly to Centralina. Summaries of job duties and prerequisites were e-mailed to each prospective participant along with a request for minimum, maximum and actual salary figures for each position surveyed. In cases where several individuals held the same job title, we requested an average of actual salaries. The replies were tabulated and market salary minimums, maximums, and averages were calculated for each position surveyed.

Current salaries of Town employees were compared employees against the calculated figures to determine where each ranked in the market. Our goal was to identify positions that were being compensated at a level below the market minimum. Since the market minimum represents an entry-level salary in the market, positions paid below entry level would most likely result in the largest amount of turnover.

Finally, an internal review was conducted in conjunction with Town staff to determine internal equity based on reporting relationships, established career paths, and complexity of the position employed by the Town and that of the positions in surveyed communities.

II. **Analysis and Observations.**

Survey results indicate that the Town of Waxhaw generally compensates current employees at a level above the surveyed market minimums (see Chart 1). This indicates that the Town is committed to remaining competitive in recruitment of qualified personnel in the job market. However, while the majority of incumbents are paid at a rate at or above the market minimum, the minimum and maximums of the Town's pay ranges are generally lower than the market (see Chart 2).

This situation creates the need to assign the identified positions to market indicated Grades within the existing pay ranges. The reassignment of positions needs to be accomplished to avoid widespread compression issues. Following are a series of recommended strategies to address the issues identified by the survey.

III. **Strategies to Address Concerns**

Pay Plan Ranges

- No changes in the current ranges are recommended; although additional Grades are required to accommodate survey results (see Table 1).

Assign Positions to Pay Plan According to Market Survey

- Positions should be realigned with market comparable pay ranges to assure recruitment of qualified personnel. Table 1 provides a comparison of current positions and grades versus market driven recommendations. The Town will benefit from this investment in the form of greater ease in recruiting and retaining of personnel. The adjustments recommended combine market driven data and internal relationships to preserve the balance and equity of the organization.

Cost of Salary Adjustments to Market Minimums

- Town employees are generally compensated above market minimums so the adjustment of existing positions to market driven ranges will cost approximately **\$20,527**. Table 2 shows the position, current salary, proposed salary and the percent that the current salary is of market minimum. This is not a one-time implementation cost, but will be reflected in future budgets as this level of funding is maintained. The Town will benefit from this investment in the form of greater ease in recruiting and retaining of personnel. Employees will benefit by preventing long-term employees from maxing out of their salary ranges. This is the minimum recommended level of adjustment.

Cost of Salary Adjustments to Address Compression

- Salary compression is the situation that occurs when there is only a small difference in pay between employees regardless of time in grade (experience). Compression creates recruitment and morale issues since; new employees can only be recruited by offering them as much or more than incumbents. Table 3 shows the positions affected by compression and the proposed salary levels that would alleviate that condition. Compression for this study was calculated using the formula of an average salary growth of 1.5% annually. The cost of implementing the proposed adjustments for compression is an additional **\$37,829**. This is not a one-time implementation cost, but will be reflected in future budgets as this level of funding is maintained.

Position Titles

- As this survey was being prepared, there was occasional inconsistency of job titles as noted on the job descriptions, on the salary ranges, and on a list of actual salaries. Using consistent job titles (i.e.: in job descriptions, in salary references, in payroll programs, etc.) will make them easier to manage across the organization and reduce the opportunity for confusion when making staffing or compensation decisions.
- The title of **Maintenance Worker II** is informally used to signify employees with a higher level of skill and experience than Maintenance Worker I. The position of Maintenance Worker II should be formalized and a job description should be prepared to allow for equity in promotions or recruitment into this position. The new position has been classified according to the market study for a level II maintenance worker.
- The **Safety Officer** and **Downtown Manager** positions were surveyed and placed on the position classification plan. These are positions that may be filled in the future.

IV. Summary of Benefits Survey

The Town of Waxhaw offers its workforce a very competitive benefit package. Results indicate that sick leave, holidays, life insurance and retirement benefits are at market levels (see Table 4). The two exceptions were in vacation leave and life insurance. All respondents reported a scaled formula for the earning of vacation leave that increased with the employee's years of service. While the ratio of years of service to vacation leave varied; the typical range spanned from a minimum of ten days to a maximum of twenty days. Life insurance was often reported as a function of salary or at least followed a scalar approach. Reviewing the Town's vacation and life insurance benefits would provide a further incentive for recruitment and retention of personnel.

V. **Summary of Salary Survey**

This summarizes the findings of our compensation study on behalf of the Town of Waxhaw. Overall findings indicate that the total benefit package offered is sufficient to maintain a competitive recruitment and retention effort in the designated workforce market.

The recommended adjustments would make for a better alignment and guide for future reference. The accompanying tables and charts provide a more detailed account of the data.

Please do not hesitate to contact me for further analysis or clarification.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert A. Henderson", written over a horizontal line.

Robert A. Henderson
Information Systems Administrator
Attachments

Chart 1. Comparison of Waxhaw's Actual Salaries and Market Ranges

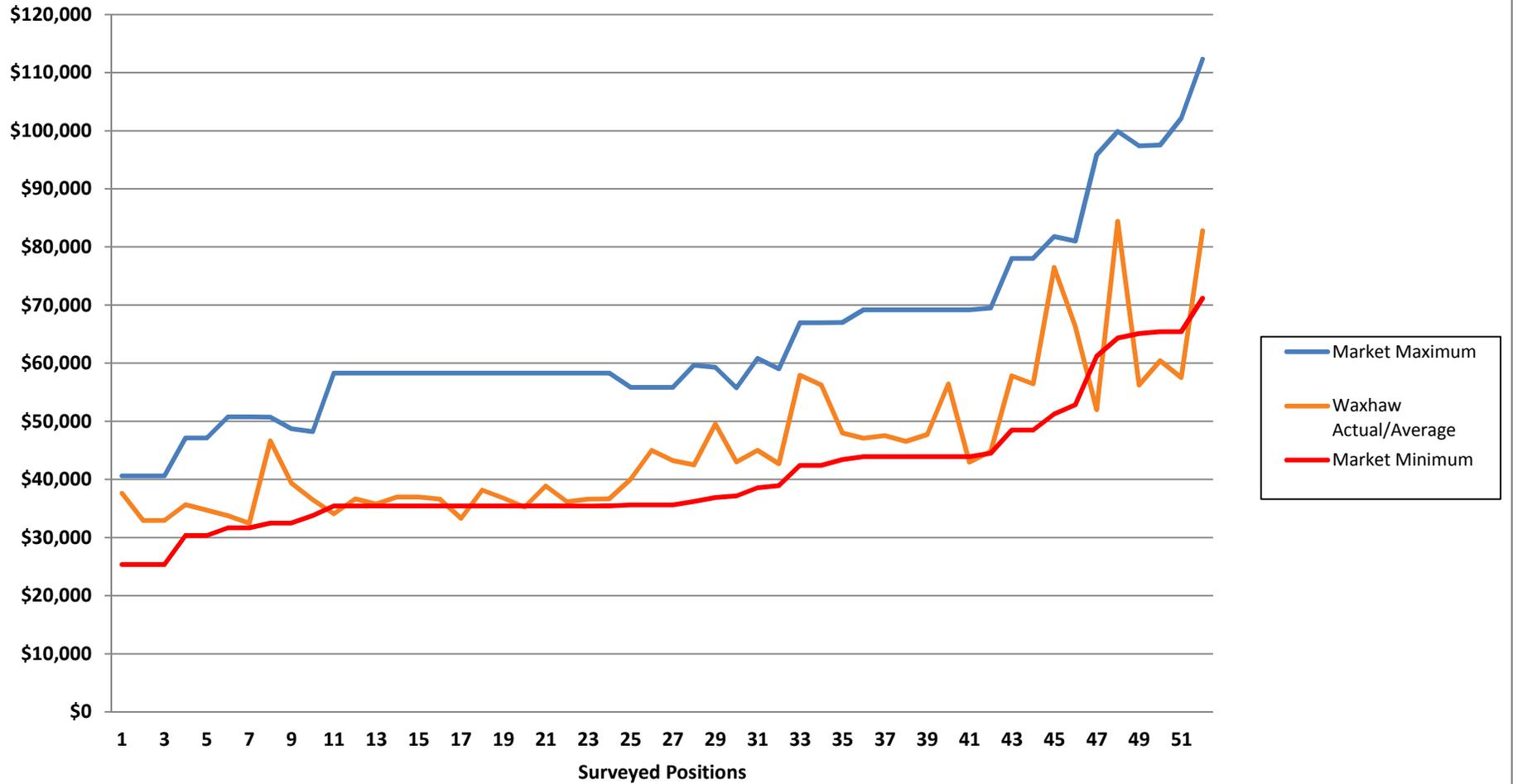


Chart 2. Comparison of Surveyed and Actual Salary Ranges Normalized on Reported Minimums

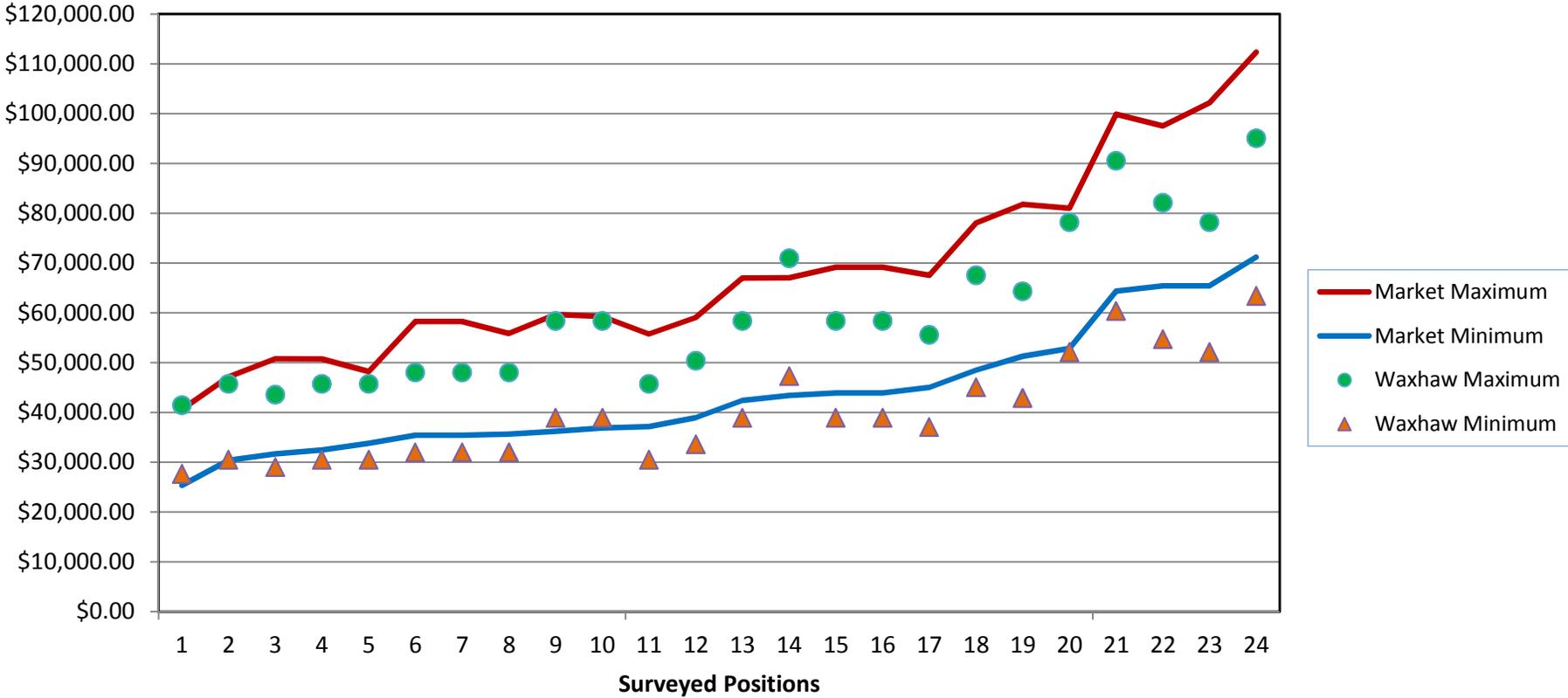


Table 1.

Current Position Classification

Proposed Position Classification

Grade	Position	Proposed Minimum	Proposed Maximum	Grade	Position	Proposed Minimum	Proposed Maximum								
1		\$22,744	\$34,116	1		\$22,744	\$34,116								
2		\$23,881	\$35,822	2		\$23,881	\$35,822								
3		\$25,075	\$37,613	3		\$25,075	\$37,613								
4		\$26,329	\$39,494	4		\$26,329	\$39,494								
5	Maintenance Worker I	\$27,645	\$41,468	5	Maintenance Worker I	\$27,645	\$41,468								
6	Animal Control Officer Permitting Tech	\$29,028	\$43,542	6		\$29,028	\$43,542								
				7	Maintenance Worker II	\$30,479	\$45,719								
7	Administrative Assistant to Public Services Administrative Assistant to Police Chief Administrative Assistant to Police Department Assistant Tax Collector Assistant Events Coordinator	\$30,479	\$45,719	8	Administrative Assistant to Police Chief Administrative Assistant to Police Department Administrative Assistant to Public Services Deputy Town Clerk Permitting Technician	\$32,003	\$48,005								
								9	Marketing and Events Assistant	\$33,603	\$50,405				
												10	Animal Control Officer Building Inspector/Code Enforcement Officer Community Affairs Officer Patrol Officer	\$35,283	\$52,925
12	Events Coordinator Planner II Police Investigator Police Sergeant	\$38,900	\$58,350	12	Automotive Mechanic Supervisor Events and Promotions Manager Police Investigator Technology Assistant	\$38,900	\$58,350								
								13		\$40,845	\$61,267				
								14	Technology Manager	\$42,887	\$64,331				
15	Police Lieutenant	\$45,032	\$67,547	14	Detective Sergeant Downtown Manager Planner II Police Sergeant Safety Coordinator	\$42,887	\$64,331								
16	Town Clerk	\$47,283	\$70,925												
17	Chief Building Inspector	\$49,647	\$74,471												
18	Human Resources Manager-Website Administrator Planning and Zoning Administrator	\$52,130	\$78,194												
19	Public Services Director	\$54,736	\$82,104	15	GIS Planner Tax Collector/Deputy Finance Officer	\$45,032	\$67,547								
20		\$57,473	\$86,209												
21	Director of Planning and Community Development	\$60,347	\$90,520	16	Police Lieutenant Town Clerk	\$47,283	\$70,925								
22	Chief of Police	\$63,364	\$95,046												
23		\$66,532	\$99,798	17	Chief Building Inspector	\$49,647	\$74,471								
24		\$69,859	\$104,788	18	Planning and Zoning Administrator Technology Manager	\$52,130	\$78,194								
25		\$73,352	\$110,028	19		\$54,736	\$82,104								
26	Town Manager	\$77,019	\$115,529		20		\$57,473	\$86,209							
					21	Parks and Recreation Director	\$60,347	\$90,520							
					22	Director of Human Resources/Website Administrator Director of Public Services	\$63,364	\$95,046							
					23	Director of Planning and Community Development	\$66,532	\$99,798							
					24	Chief of Police	\$69,859	\$104,788							
					25		\$73,352	\$110,028							
					26		\$77,019	\$115,529							

**Table 2. Positions Compensated Below Market Minimums
Placed at Market Recommended Minimums**

Position Title	Waxhaw Salaries	Market Minimum	Percent of Minimum
Director of Public Services	\$60,409	\$63,346	95.4%
GIS Planer	\$44,807	\$45,032	99.5%
Human Resources Director	\$57,534	\$63,346	90.8%
Parks and Rec Director	\$52,000	\$60,347	86.2%
Patrol Officer	\$34,086	\$35,283	96.6%
Patrol Officer	\$33,322	\$35,283	94.4%
Patrol Officer	\$35,235	\$35,283	99.9%

**Table 3. Positions Deemed Compressed Based on
Compression formula of 1.5% Annual Growth**

Position Title	Waxhaw Salaries	Calculated Salary	Percent of Calculated
Administrative Assistant	\$34,715	\$35,843	96.9%
Detective	\$42,523	\$44,152	96.3%
Detective Sergeant	\$42,948	\$48,677	88.2%
Director of Public Services	\$60,409	\$75,698	79.8%
Fleet Maintenance Supervisor	\$42,702	\$45,902	93.0%
GIS Planer	\$44,807	\$46,383	96.6%
Human Resources Director	\$57,534	\$70,948	81.1%
Lieutenant	\$56,445	\$56,503	99.9%
Parks and Rec Director	\$52,000	\$62,157	83.7%
Patrol Officer	\$34,086	\$35,283	96.6%
Patrol Officer	\$33,322	\$35,283	94.4%
Patrol Officer	\$38,138	\$38,988	97.8%
Patrol Officer	\$36,785	\$36,871	99.8%
Patrol Officer	\$35,235	\$35,812	98.4%
Patrol Officer	\$36,156	\$36,871	98.1%
Patrol Officer	\$36,609	\$37,400	97.9%

*Compression calculated on minimum of reclassified Grade.

Table 4. Benefits Survey Results

Benefit type	Market Average Benefit	Waxhaw Benefit
Vacation - Years of service	10-20 days per year; scale based on years of employment	12 days per year; anything accrued over 30 days goes to sick leave
Sick leave	12 days per year	12 days per year
Holiday leave	11.5 days per year	12 days per year
Other Leave	Occasional Bereavement Leave	None
Individual Health/Dental/Vision Insurance	Majority of health and dental paid by employer; vision mostly paid by employee	All paid by employer
Family Health/Dental/Vision Insurance	Majority employee paid; a few jurisdictions share the cost	Available -- Paid by employee
Retiree Health/Dental/Vision Insurance	Half of the responses indicate a sharing formula based on years of employment; the other do not provide this benefit for retirees	Not Available
Life Insurance	Most provide ranging from \$10,000 to a function of salary with varying maximums -- highest reported \$300,000	\$50,000 Benefit paid by employer
Retirement Benefit	NCLGRS Retirement	NCLGRS Retirement
Supplemental Retirement	Most responses indicate that the employer contributes (at least a match); one funded solely by employees	401k employer contributes 5%; employee contributes voluntarily
Longevity Pay	Few of those surveyed provide on a sliding scale; most do not provide	Offered to grandfathered employees; otherwise NONE
Long-term or short-Term Disability	Mostly available at employees expense; some provide partial	Both available at employer's expense
Cafeteria Plan	Available in the majority of those surveyed	Not Available
Flex Spending Account	Available in the majority of those surveyed	Available
Health Savings Account	Not Available	Not Available
Cell Phone Reimbursement/Provided	Half of respondents provide some sort of benefit; three responses indicated a system similar to Waxhaw's	\$50 reimbursement if personal phone used for work; or certain employees are provided phones at employer's expense
Other Benefits	Flex workweek; Wellness program	AFLAC, EAP



VI. New Business

C. Discussion and Possible Approval of Furniture Quote for Town Board Chambers

Presenter: [Greg Mahar](#)

Information

As requested by the Board, Interim Town Manager Greg Mahar obtained a quote from FSI Office Furniture for Town Board Chambers in the amount of \$8,408.80.

Board Action

- Possible action on the furniture quote for Town Board Chambers.

FSI Furniture Quote Form

2/23/2015

Town Council Chambers

Customer:	Quoted By:
Town Of Waxhaw Greg Mahar 843-2195	Mark Turcotte Senior Account Manager 704-968-5621 mark.turcotte@formsandsupply.com

Comments: Standard Cherry/Maple/Walnut	Sub-Total: 7624.10 Installation Labor: 784.70 Freight: 0 Tax Rate: Tax: Grand Total: \$8,408.80
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★ See bottom of Quote to Consider a Lease Option for AS LOW AS: \$202.65 per month for 60 mos. ★

ITEM #	QTY	MFG	DESCRIPTION	FABRIC FINISH	USER TAG	LIST	SELL	EXT SELL
1	65-3060TP	2	Ind	30" x 60" Top w/two Grommets	TBD	720.00	396.00	792.00
2	SP65-3071CTPL	1	Ind	30" x 71" Top w/two Grom, Left		1067.00	586.85	586.85
3	SP653071CTPR	1	Ind	30" x 71" Top w/two Grom, Right		1067.00	586.85	586.85
4	SP65-0660BP	2	Ind	Custom wood Privacy Panels 6"		167.00	91.85	183.70
5	65-6028BP	4	Ind	Std 60" wide Panels		491.00	270.05	1080.20
6	92-2428RB	8	Ind	Std Rectangle Panels Bases		957.00	526.35	4210.80
7	SP65-0659BP	2	Ind	Custom wood Privacy Panels 6"		167.00	91.85	183.70
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								

Product is produced by the manufacturer to the above specifications and is the property of FSI Office until invoice is fully paid.
Once ordered it can not be changed, canceled, or returned.

ITEM #	QTY	MFG	DESCRIPTION	FABRIC FINISH	USER TAG	LIST	SELL	EXT SELL
21								
22								
23								
24								
25								
26								
27								
28								

Total List and Sell: 13862.00 7624.10

This Quote is Good for: 90 Days ▾

Product Discount for this Project: 45.0%

Customer Authorization

Credit Card #: _____

Exp Date: _____ VISA / MC / AMEX

Cardholder: _____

Date: _____

Signature: _____

P.O. Number: _____

Leasing provided by:



...your business equipment
leasing partners.

Estimated payments shown are for companies in business 2 years or more. Documentation fee up to \$250 required.

For transactions over \$50,000, please call for special rates. Rates effective through December 31, 2010.

Please note: Payments shown are subject to state and local taxes. Consult your tax advisor for more information.

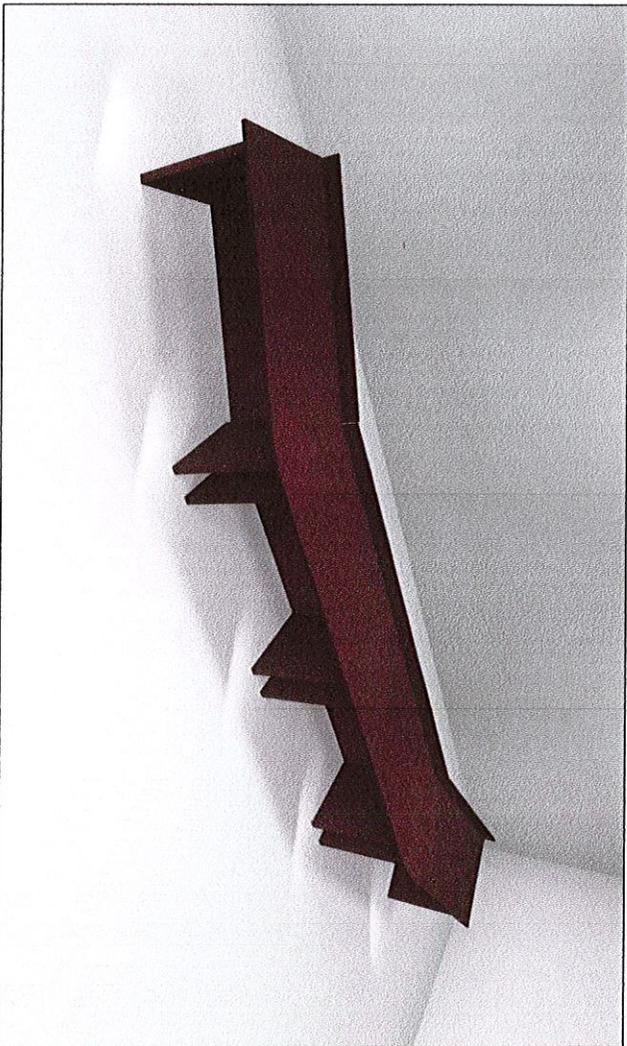
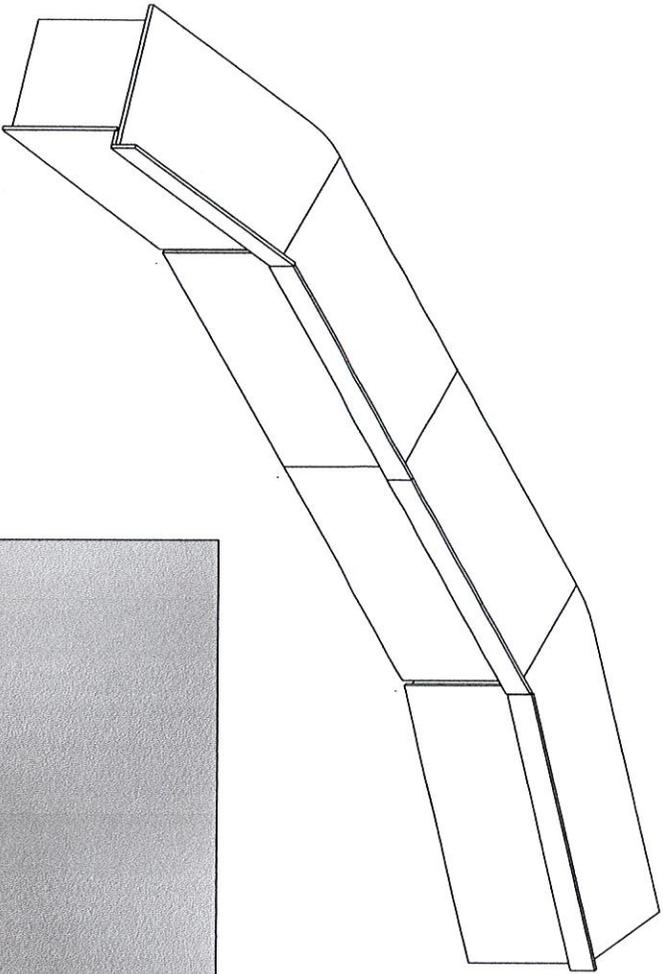
Subject to Marlin's credit approval and receipt of required documents.

Charles Byrd
Senior Account Executive
6470 East Johns Crossing, Suite 430
Johns Creek, GA 30097

Phone: (888)479-9111 ext. 3247
Fax: (877)470-6756
cbyrd@marlinleasing.com
www.marlinleasing.com

Product is produced by the manufacturer to the above specifications and is the property of FSI Office until invoice is fully paid.

Once ordered it can not be changed, canceled, or returned.



Indiana Furniture is pleased to present this project for approval. Drawings and bills of materials are based on the information provided to Indiana Furniture. Indiana Furniture is not responsible for the accuracy of measurements provided or information regarding the user's requirements, and customer waives any claim against Indiana Furniture with regard to such measurements or information. Please note that all drawings and bills of materials must be reviewed by the project manager for accuracy before ordering.

*MADE IS FOR REFERENCE ONLY AND IS AT NO PARTICULAR SCALE

**REFER TO FINISH SAMPLES WHEN SELECTING FINISHES



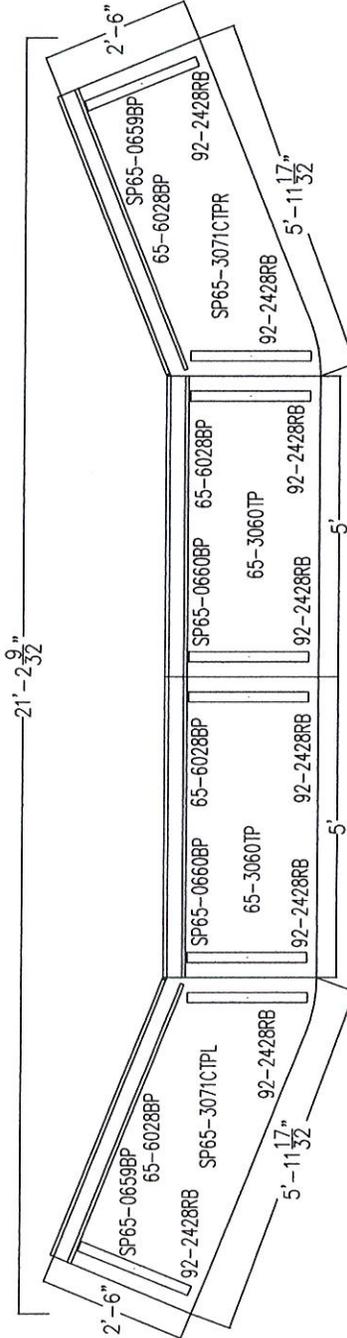
INDIANA FURNITURE

1224 MILL STREET
PO BOX 270
JASPER, IN 47547-0270
PHONE: 812.482.5727
FAX: 812.422.5727

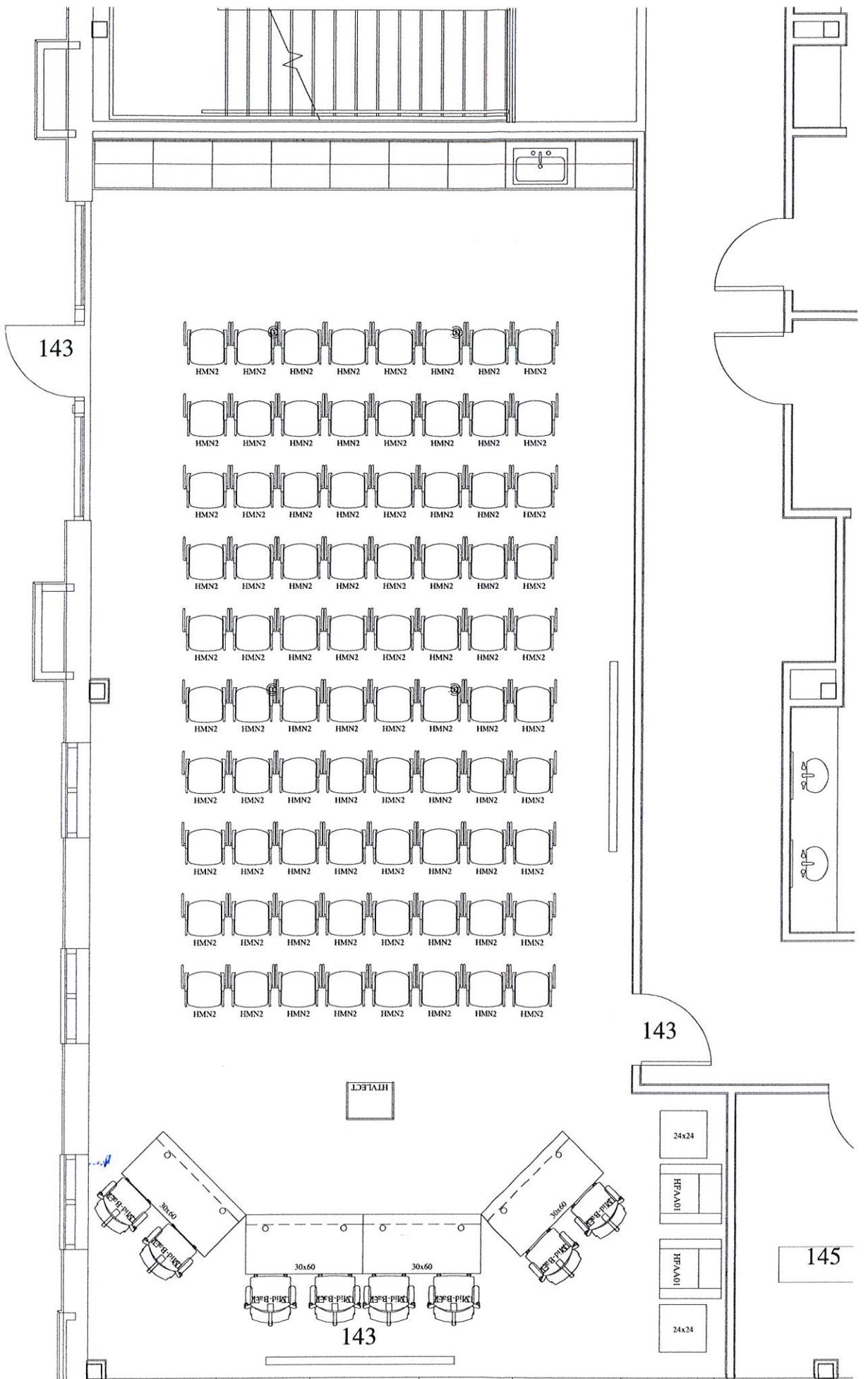
**PROJECT
FROMS AND SUPPLY
WAXHAW**

SCALE:	1/2" = 1'-0"
DATE:	02.18.2015
DRAWN BY:	ANGIE SEBERT
IF/ REP:	CATHY CHERRY
CUSTOM QUOTE #:	42033.50617
DRAWING#:	150212.049
SHEET NO:	

02



Indiana Furniture is pleased to present this project for approval. Drawings and bills of materials are based on the information provided to Indiana Furniture. Indiana Furniture is not responsible for the accuracy of measurements provided or information regarding the user's requirements, and customer waives any claim against Indiana Furniture with regard to such measurements or information. Please note that all drawings and bills of materials must be reviewed by the project manager for accuracy before ordering.



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LITVLECT

30x60
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Mid-Back
30x60
Mid-Back

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24x24
HFPA01
HFPA01
24x24

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